Pitney Bowes

SendSuite® Shipping

SendSuite® Shipping Solutions for Desktop Shipping

Administrator Guide

U.S. English Edition

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This document (SVTS9117 Rev J) defines many of the features in SendSuite Shipping version 6.50.

SendSuite® Shipping
Administrator Guide
SVTS9117 Rev. J
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IIS Settings

Time Out

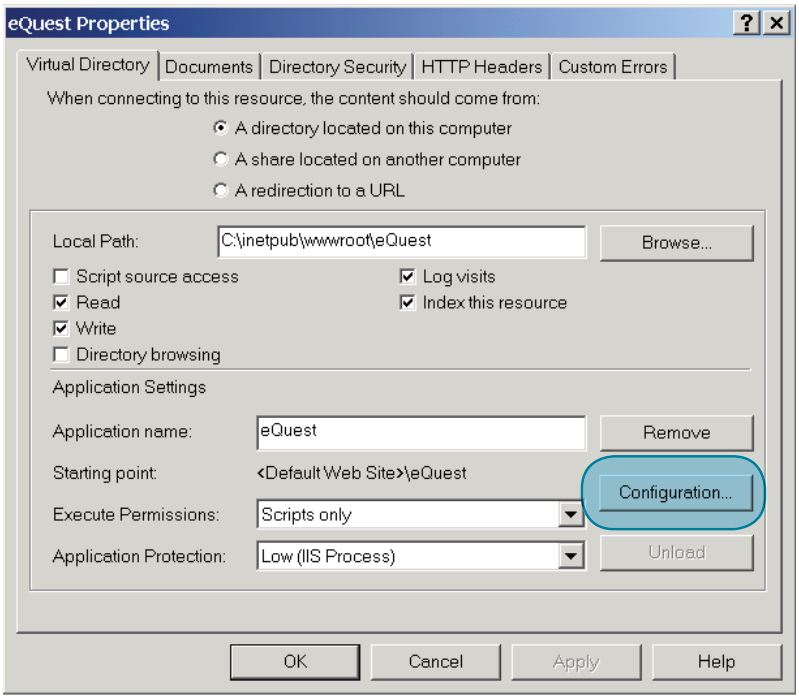
The SendSuite® Shipping workstations connect to the server through Microsoft Internet Information Services (IIS).

Once the internet server has been installed, there are several default settings that can be modified.

Because you do not want users tying up system resources indefinitely, IIS will disconnect a user after a period of time if the user has not performed any actions during that time period. The default time-out setting is 20 minutes.

Follow the instructions below to change the time-out setting:

1. From the Windows® Start menu, click **Settings** > **Control Panel**.
2. Double click **Administrative Tools**.
3. Double click **Internet Services Manager**.
4. Expand the icon for your server.
5. Double-click on **Default Web Site**.
6. Right-click on **eQuest**, and select **Properties**.
7. On the **Virtual Directory** tab, click the **Configuration** button.

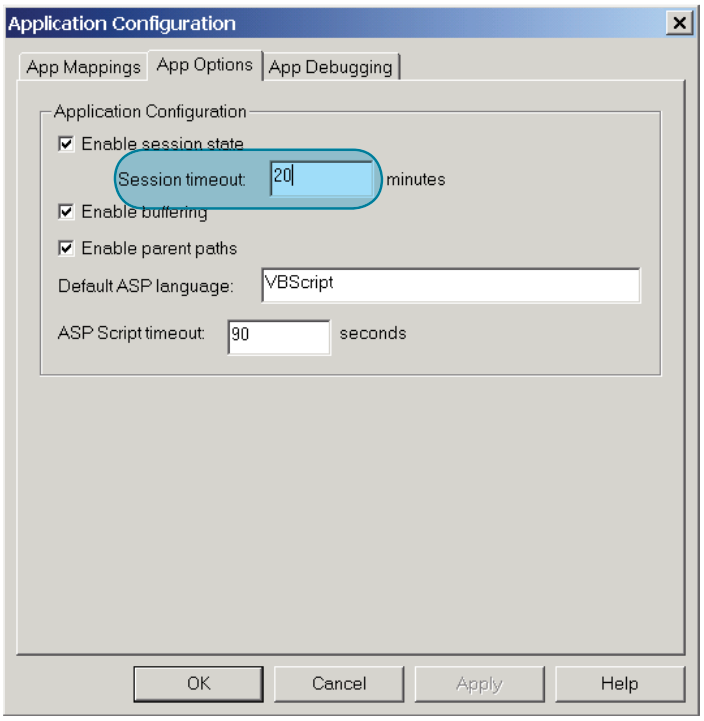


IIS Settings

Time Out

NOTE: Do NOT remove the checkmark next to **Enable session state**. The user must maintain a session in order to communicate with the SendSuite Shipping components.

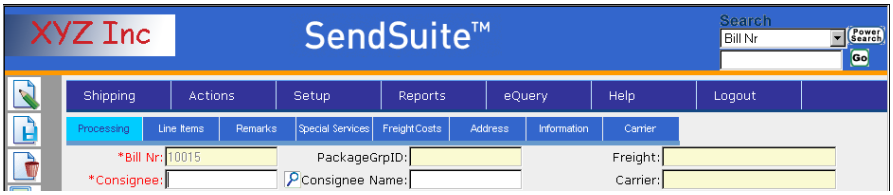
8. On the **App Options** tab, change the **Session timeout**.



IIS Settings

Logo

In the upper left corner of all screens, a logo is displayed. The Pitney Bowes logo is automatically installed with the product.



You may change the logo as desired. The new graphic you use must meet the following conditions:

- It must be a gif file.
- To look normal, it must be in proportion with 180 by 44 pixels.

  If you use a graphic of a different size, it will be resized to fit into a 180x44 space. For example, a 360x88 file will shrink and fit in the space, looking fairly normal. However, a 200x30 file will shrink one direction and stretch the other direction, making it look too tall and slim.

To replace the Pitney Bowes graphic:

1. Rename your logo and call it **leftlogo.gif** or **logoright.gif**.

   > **NOTE:** Upon installation, **logoleft.gif** is the Pitney Bowes logo and there is no **logoright.gif**. Pitney Bowes recommends you use **logoright.gif** for a customer's logo.

2. Copy your logo file and place it in the following directory:

   ~/Inetpub/wwwroot/eQuest/Images/

3. If you are prompted to the existing .gif file, click **Yes**.
4. Users will see the graphic the next time they refresh their screens.
   a. On the Shipping Workstation, select the **Tools** menu.
   b. Select **Internet Options**.
   c. In the **Temporary internet Files** box, click the **Delete Files...** button.
   d. Check the box to **Delete all offline content**.
   e. Click **OK** to delete the temporary files.
   f. Click **OK** to close the **Internet Options** window.

NOTE: If users do not see the new logo, they may need to clear the old one from their cache. They can do this by deleting their temporary Internet files from Internet Explorer. To delete these files, follow the instructions to the right.

SendSuite Database Maintenance

As a critical system in your operation, it is important that you regularly maintain the SendSuite Database. This includes backing up the data, optimizing the storage of the data, and truncating the transaction log.

You can schedule a backup of the entire database and the transaction log. The frequency of this backup is a decision your company must make based on your shipping volume and data storage policies. You also may want to perform a one-time backup prior to applying a rate change or a software update. Performing a one-time backup is also a good idea before purging records from the database.

All SendSuite installations should have the following:

- A backup of the Master Database
- A database maintenance plan, including a schedule for the plan
    - Make sure that MS SQL Server Agent is running and set it to automatically start.
- A Database Maintenance Plan to back up and truncate the Transaction Log
    - The SQL Server backup of the transaction log truncates the log. Without truncation, the transaction log can grow to an enormous size. So, even if you back up the entire drive nightly, you will still want to have a SQL Server plan backup and truncate the transaction log. See *Understanding the Transaction Log* on page 1-21.

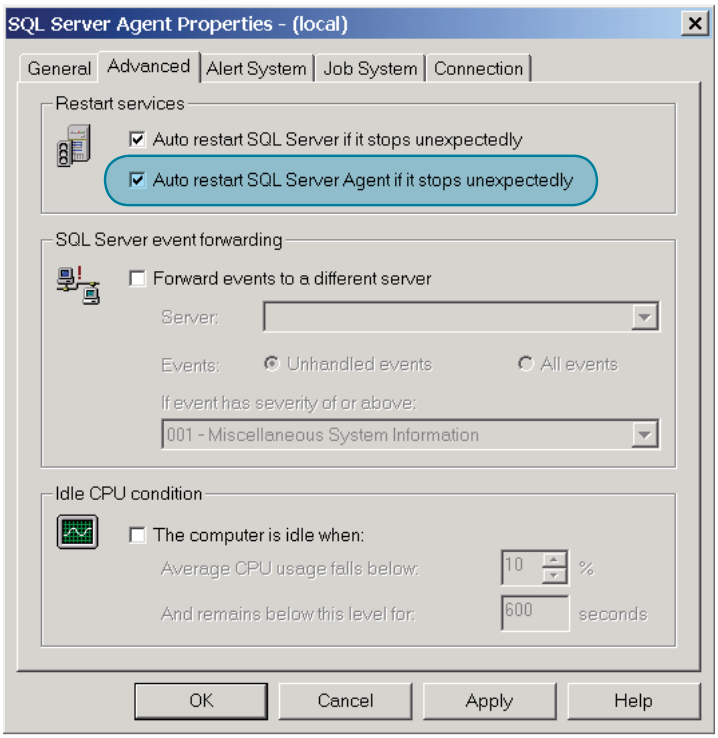
SendSuite Database Maintenance

SQL Server Agent

The SQL Server Agent must be running for any scheduled backup to occur.

To verify if SQL Server Agent is running, perform the following steps:

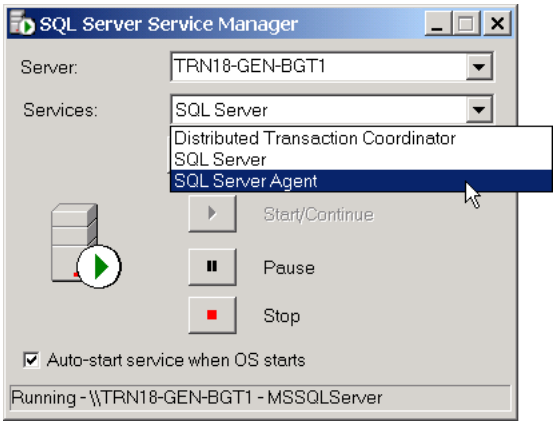
1. From the Windows® Start menu, click **Programs > Microsoft SQL Server** > **Enterprise Manager.**
2. Double-click **Microsoft SQL Servers**.
3. Double-click **SQL Server Group**.
4. Click your PC name to expand the folder.
5. Click **Management** to expand the folder.
6. Right-click on **SQL Server Agent**.
7. Verify the **Start** option is selected. The arrow displays in green when the SQL Server Agent is running.
8. Right-click on **SQL Server Agent**, and select **Properties**.
9. Click the **Advanced** tab.
10. Check the box next to **Auto restart SQL Server Agent if it stops unexpectedly**.



SendSuite Database Maintenance

SQL Server Agent

11. Click **OK**.
12. You will be prompted to restart the SQL Server Agent. Click **Yes**.
13. Close the Enterprise Manager.
14. Open the SQL Server Manager in the system tray in the lower right corner of your screen.
15. Click the drop-down in the **Services** field and select **SQL Server Agent**.



16. Check the box next to **Auto-start service when OS starts**.



SendSuite Database Maintenance

Creating a Database Maintenance Plan

The Database Maintenance Plan Wizard is used to help you set up the core maintenance tasks necessary to ensure that your database performs well, is regularly backed up in case of system failure and is checked for inconsistencies.

Using the Database Maintenance Plan, you can:

- Update distribution statistics
- Back up database and transaction log files
    - System databases are special databases that cannot be backed up. Since transaction log backups cannot be done on the system databases, we recommend two separate DB Maintenance plans — one for the system databases and one for the ConquestDB.

> **NOTE:** Both maintenance plans assume the PC running the backups is on 24 by 7. If this is not the case, recommended times will need to change. The recommended times would be appropriate even if a second shift is run, since each task should complete in less than two minutes. Change the recommended times only if the database is very large and heavily used.

SendSuite Database Maintenance

Creating a Database Maintenance Plan

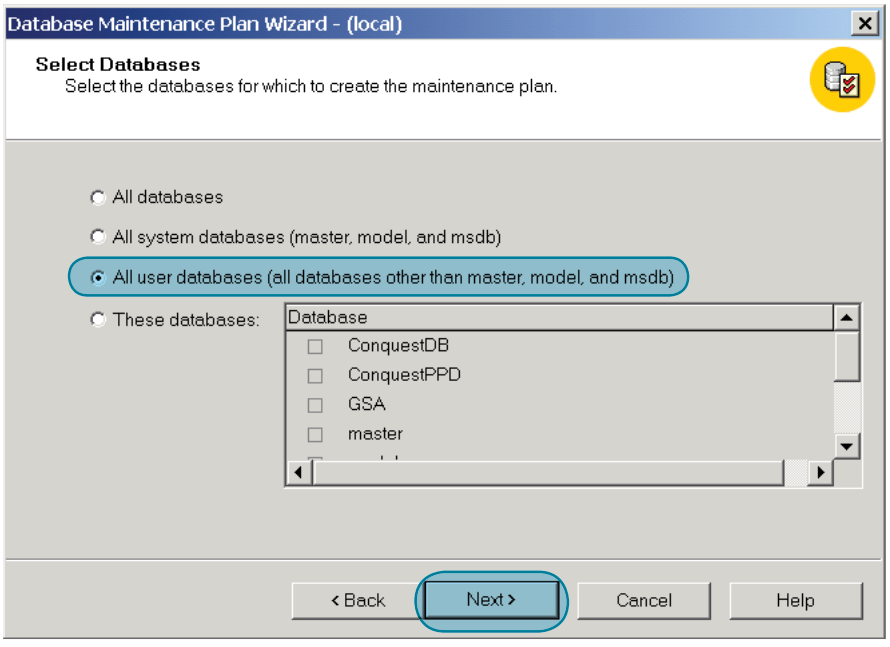
NOTE: This maintenance plan backs up the system databases.

Setting Up the System Maintenance Plan

- You should ensure that there is enough disk space to store the backups generated. The amount of disk space needed depends on the present size and estimated future size.
- The backup should be written to a drive other than the drive that contains the SQL database. The default is C:\MSSQL\BACKUP. This can be changed to write to another local drive or local tape backup device. It is recommended that you keep the default directory name and change the drive letter if necessary.
- The PC configured to do the backup must be on in order to run the backup scheduled.

To set up the system maintenance plan:

1. From the Windows® Start menu, click **Programs** > **Microsoft SQL Server** > **Enterprise Manager.**
2. Double-click **Microsoft SQL Servers**.
3. Double-click **SQL Server Group**.
4. Click your PC name to expand the folder.
5. Click **Management** to expand the folder.
6. Right-click **Database Maintenance Plans** and select **New Maintenance Plan**.
7. From the **Welcome to the Database Maintenance Plan Wizard**, click **Next**.
8. To backup all the databases, click the **All user databases** option button and click **Next**.



SendSuite Database Maintenance

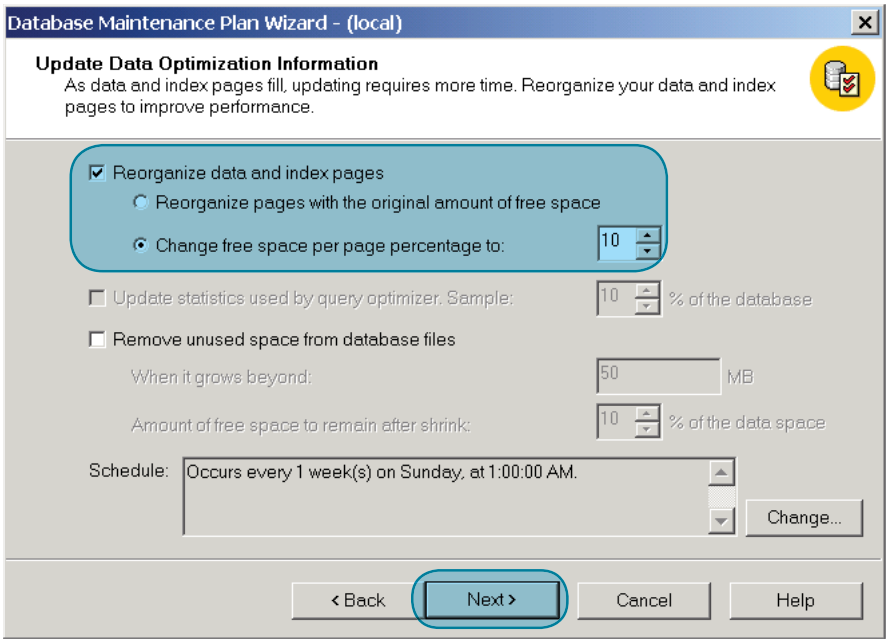
Creating a Database Maintenance Plan

Alternatively, select the individual databases to be backed up and click **Next**.

- Master
- Model
- MSDB

9. From the **Update Data Optimization Information** dialog box, leave the default settings selected. Do not make any changes to the options on this dialog box.
10. Accept the default selection of **Change free space per page percentage to...**
11. If necessary, click **Change** and modify when the activity is to occur. The default is every Sunday at 1:00 AM.

NOTE: When viewing the Maintenance Plan History, you may see Not Completed for databases that have had no modifications. For example, Model.

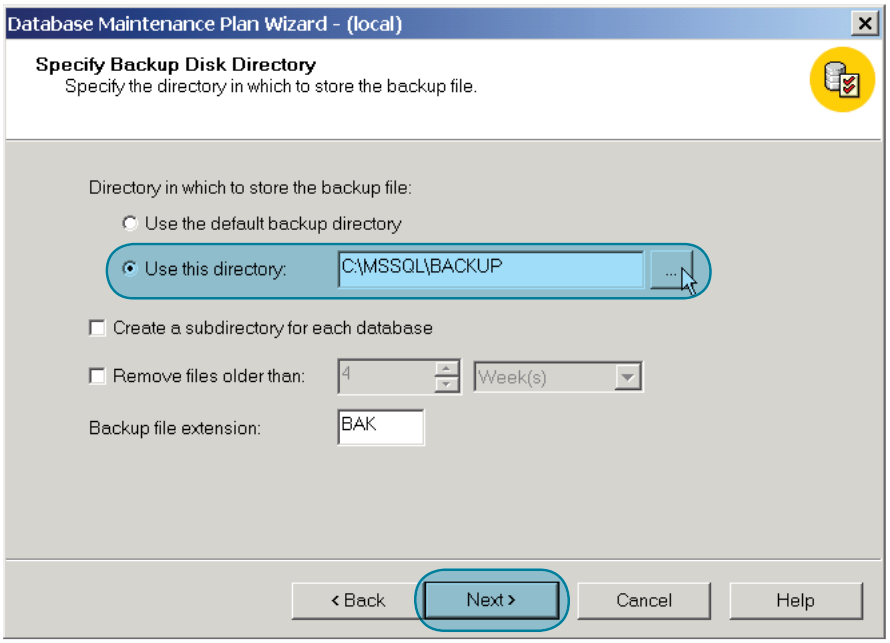

Database Maintenance Plan Wizard - (local)
Update Data Optimization Information
As data and index pages fill, updating requires more time. Reorganize your data and index pages to improve performance.
Reorganize data and index pages
Reorganize pages with the original amount of free space
Change free space per page percentage to:
10
Update statistics used by query optimizer. Sample:
10
% of the database
Remove unused space from database files
When it grows beyond:
50
MB
Amount of free space to remain after shrink:
10
% of the data space
Schedule:
Occurs every 1 week(s) on Sunday, at 1:00:00 AM.
Change...
< Back
Next >
Cancel
Help

12. Click **Next**.
13. If you have made changes, click **OK** and then click **Next**.
14. From the Database Integrity Check dialog box, leave the default settings selected. Do not make any changes to the options on this dialog box.
15. If necessary, click **Change** and modify when the activity is to occur. The default is every Sunday at 12:00 AM.
16. Click **Next**.
17. If you have made changes, click **OK** and then click **Next**.

SendSuite Database Maintenance

Creating a Database Maintenance Plan

18. Accept the defaults on the **Specify the Database Backup Plan** dialog box.
19. If necessary, click **Change** and modify when the activity is to occur. The default is every Sunday at 2:00 AM, once the database optimization and integrity checks have completed.
20. Click **Next**.
21. If you have made changes, click **OK** and then click **Next**.
22. From the **Specify Backup Disk Directory**, select **Use this directory**. The default is **C:\MSSQL\BACKUP**.
23. Click the ellipsis to navigate to another local drive or tape backup device.

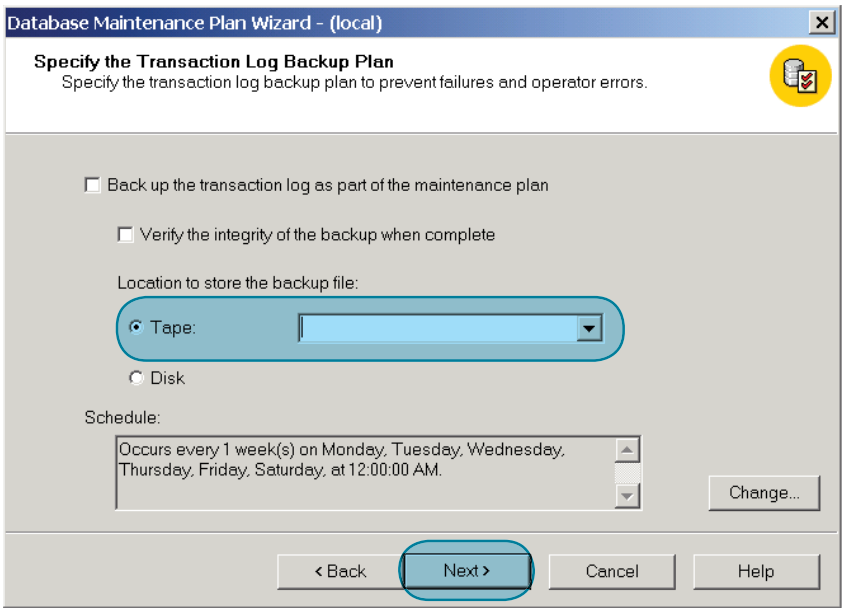


24. Select **Remove files older than** and change to the number of weeks you want to keep the backup files.
25. Three complete database backups will be saved in the specified directory.
26. Click **Next**.

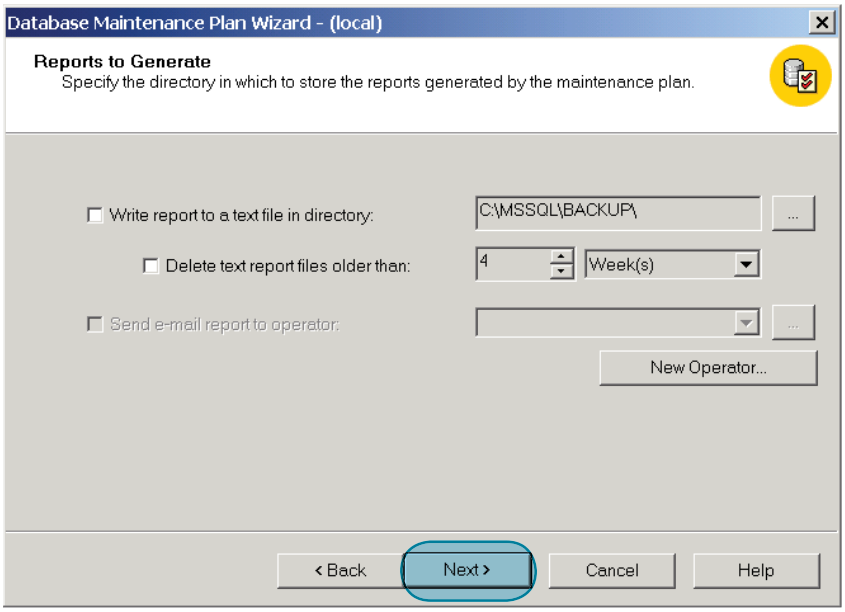
SendSuite Database Maintenance

Creating a Database Maintenance Plan

28. Select a tape drive from the drop-down menu.
    - Alternatively, you can save to your local hard drive by selecting Disk.


Database Maintenance Plan Wizard - (local)
Specify the Transaction Log Backup Plan
Specify the transaction log backup plan to prevent failures and operator errors.
Back up the transaction log as part of the maintenance plan
Verify the integrity of the backup when complete
Location to store the backup file:
Tape:
Disk
Schedule:
Occurs every 1 week(s) on Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, at 12:00:00 AM.
Change...
< Back
Next >
Cancel
Help

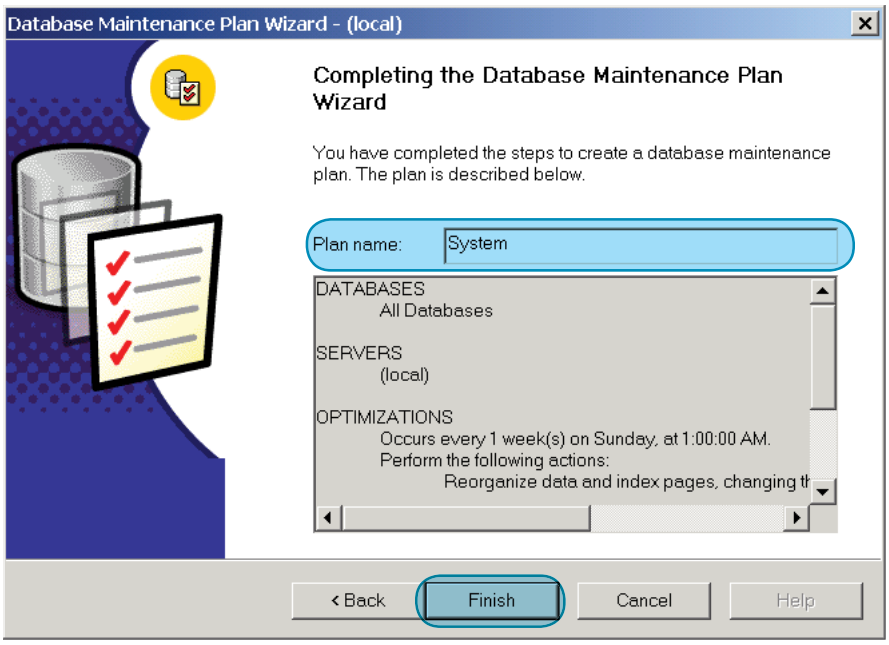
29. Click **Next**.
30. From the **Reports to Generate** dialog box, deselect all options and click **Next**.


Database Maintenance Plan Wizard - (local)
Reports to Generate
Specify the directory in which to store the reports generated by the maintenance plan.
Write report to a text file in directory:
C:\MSSQL\BACKUP\
Delete text report files older than:
4
Week(s)
Send e-mail report to operator:
New Operator...
< Back
Next >
Cancel
Help

SendSuite Database Maintenance

Creating a Database Maintenance Plan

34. Accept the defaults on the **Maintenance History** dialog box and click **Next**.
35. Enter a **Plan name**. For example, **System**.



NOTE: It is highly recommended that the backup file be saved or transferred to other locations such as a ZIP disk or other removable storage media.

36. Scroll through the screen to review the summary.
37. Click **Finish**. The following message is displayed:

    Successfully created the maintenance plan.

NOTE: This plan will back up the SendSuite database as well as the transaction log.

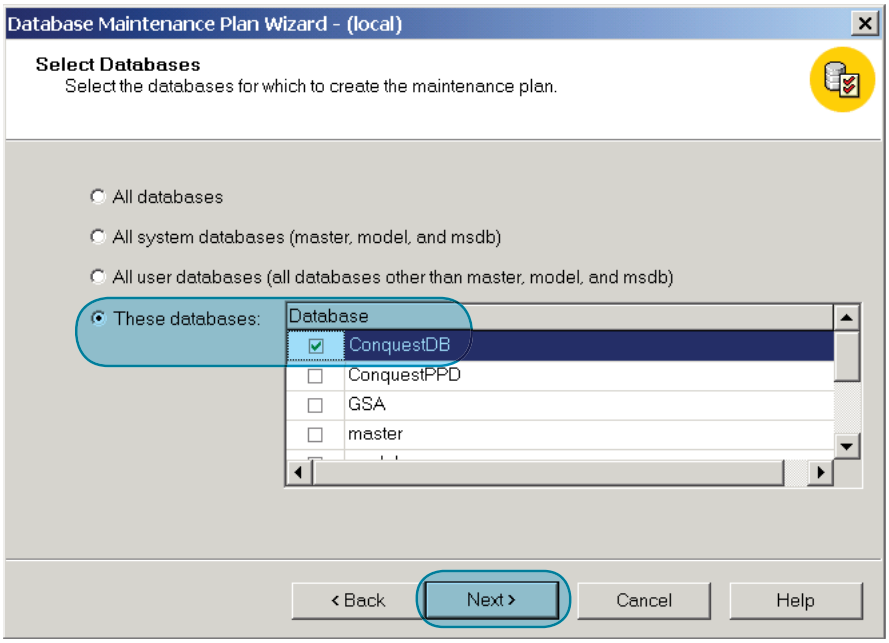
Setting Up the SendSuite Database Maintenance Plan

1. From the Windows® Start menu, click **Programs > Microsoft SQL Server** > **Enterprise Manager.**
2. Double-click **Microsoft SQL Servers**.
3. Double-click **SQL Server Group**.
4. Click your PC name to expand the folder.
5. Click **Management** to expand the folder.
6. Right-click **Database Maintenance Plans** and select **New Maintenance Plan**.
7. From the **Welcome to the Database Maintenance Plan Wizard**, click **Next**.

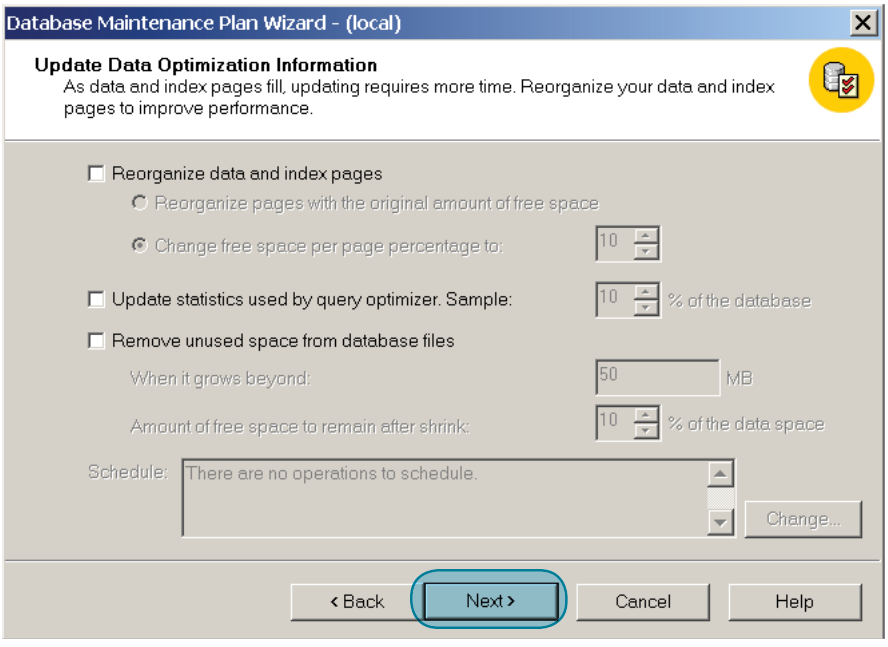
SendSuite Database Maintenance

Creating a Database Maintenance Plan

8. Select **ConquestDB** as the database to be backed up and click **Next**.



9. From the **Update Data Optimization Information** dialog box, deselect all options and click **Next**.


Database Maintenance Plan Wizard - (local)
Update Data Optimization Information
As data and index pages fill, updating requires more time. Reorganize your data and index pages to improve performance.
Reorganize data and index pages
Reorganize pages with the original amount of free space
Change free space per page percentage to:
10
Update statistics used by query optimizer. Sample:
10
% of the database
Remove unused space from database files
When it grows beyond:
50
MB
Amount of free space to remain after shrink:
10
% of the data space
Schedule:
There are no operations to schedule.
Change...
< Back
Next >
Cancel
Help

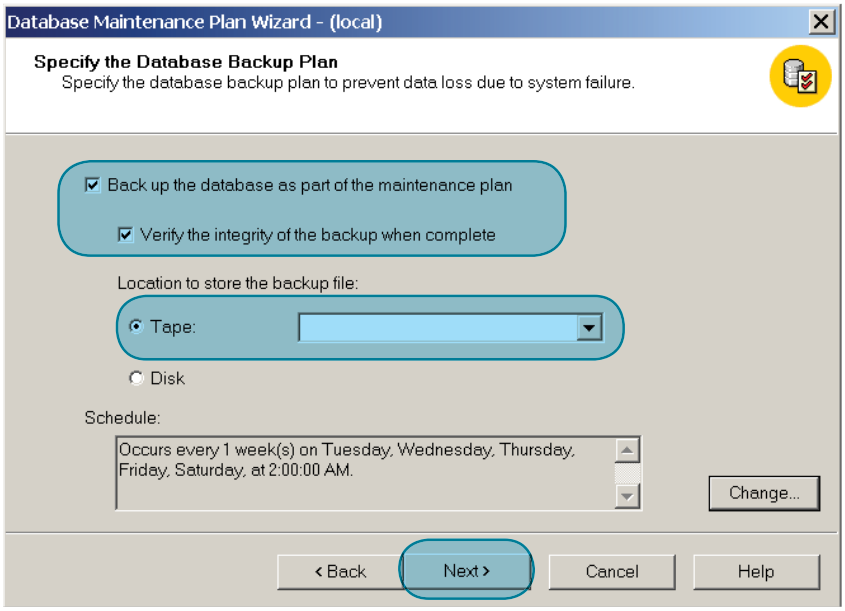
NOTE: If you have made changes, click **OK** and then click **Next**.

13. From the **Database Integrity Check** dialog box, leave the default settings selected. Do not make any changes to the options on this dialog box.
14. Click **Next**.

SendSuite Database Maintenance

Creating a Database Maintenance Plan

15. Accept the defaults on the **Specify the Database Backup Plan** dialog box.


Database Maintenance Plan Wizard - (local)
Specify the Database Backup Plan
Specify the database backup plan to prevent data loss due to system failure.
Back up the database as part of the maintenance plan
Verify the integrity of the backup when complete
Location to store the backup file:
Tape:
Disk
Schedule:
Occurs every 1 week(s) on Tuesday, Wednesday, Thursday, Friday, Saturday, at 2:00:00 AM.
Change...
< Back
Next >
Cancel
Help

16. Select a tape drive from the drop-down menu.
    - Alternatively, you can save to your local hard drive by selecting **Disk**.
17. If necessary, click **Change** and modify the schedule. The default is every Sunday at 2:00 AM, once the database optimization and integrity checks have been completed.
18. Click **Next**.
19. From the **Specify Backup Disk Directory**, select **Use this directory**.

NOTE: Ideally, assuming you are not shipping on Sunday, the schedule should be set up as follows:

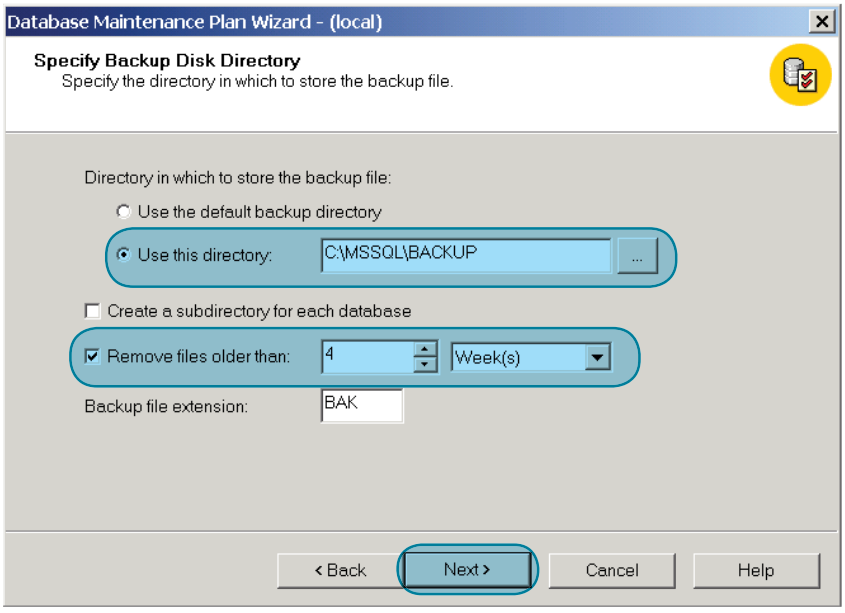
Tuesday through Saturday, at 2 A.M.

NOTE: If you have made changes, click **OK** and then click **Next**.

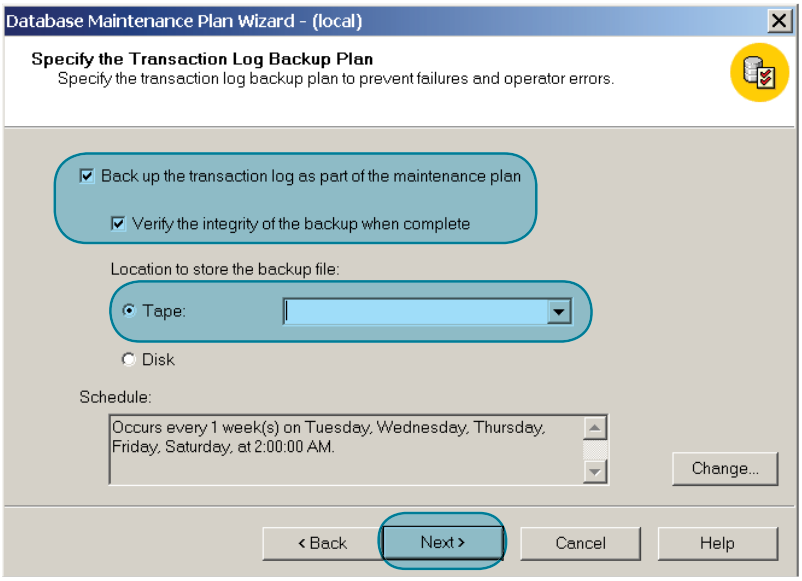
SendSuite Database Maintenance

Creating a Database Maintenance Plan

20. Click the ellipsis to navigate to another local drive or tape backup device.



21. Select **Remove files older than** and change to the number of weeks you want to keep these backups.
22. Click **Next**.
23. From the Specify the Transaction Log Backup Plan dialog box, select **Back up the transaction log as part of the maintenance plan** and **Verify the integrity of the backup when complete**.


Database Maintenance Plan Wizard - (local)
Specify the Transaction Log Backup Plan
Specify the transaction log backup plan to prevent failures and operator errors.
Back up the transaction log as part of the maintenance plan
Verify the integrity of the backup when complete
Location to store the backup file:
Tape:
Disk
Schedule:
Occurs every 1 week(s) on Tuesday, Wednesday, Thursday, Friday, Saturday, at 2:00:00 AM.
Change...
< Back
Next >
Cancel
Help

SendSuite Database Maintenance

Creating a Database Maintenance Plan

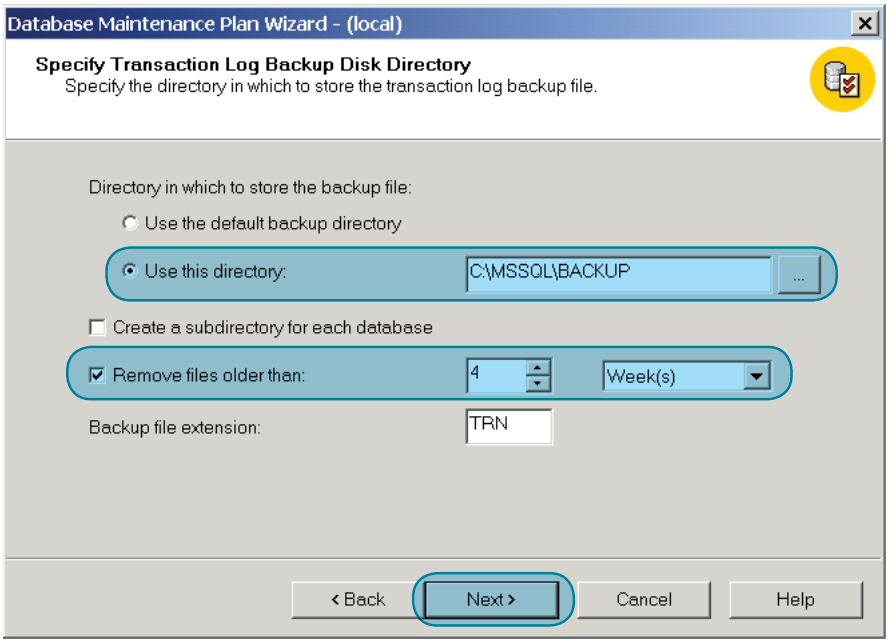
24. Select a tape drive from the drop-down menu.
    - Alternatively, you can save to your local hard drive by selecting **Disk**.
25. If necessary, click **Change** and modify the schedule. The default is every day at 12:00 AM.

> **NOTE:** In a high volume operation, you may want to run this backup several times a day. You might consider backing up more frequently during the work day. For example, every two hours. This would create 4 transaction logs each day with one complete backup.

26. Click **Next**.
27. From the **Specify Transaction Log Backup Disk Directory**, select **Use this directory**.
28. Click the ellipsis to navigate to another local drive or tape backup device. This should be the same directory as in Step 20.

NOTE: The transaction log backups contain any changes since the last complete or transaction log backup.

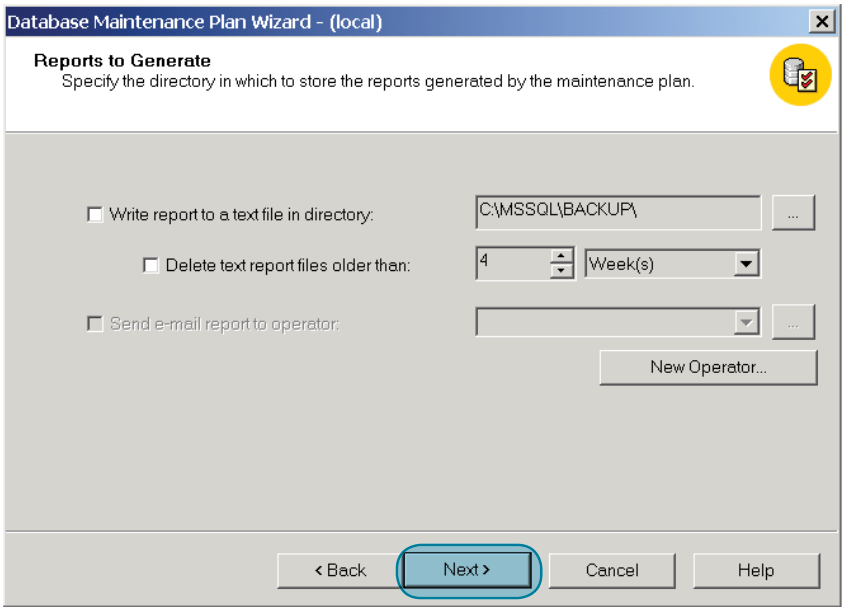
NOTE: If you have made changes, click **OK** and then click **Next**.



SendSuite Database Maintenance

Creating a Database Maintenance Plan

29. Select **Remove files older than** and change to the number of days you want to keep the backups.
30. Click **Next**.
31. From the **Reports to Generate** dialog box, deselect all options and click **Next**.

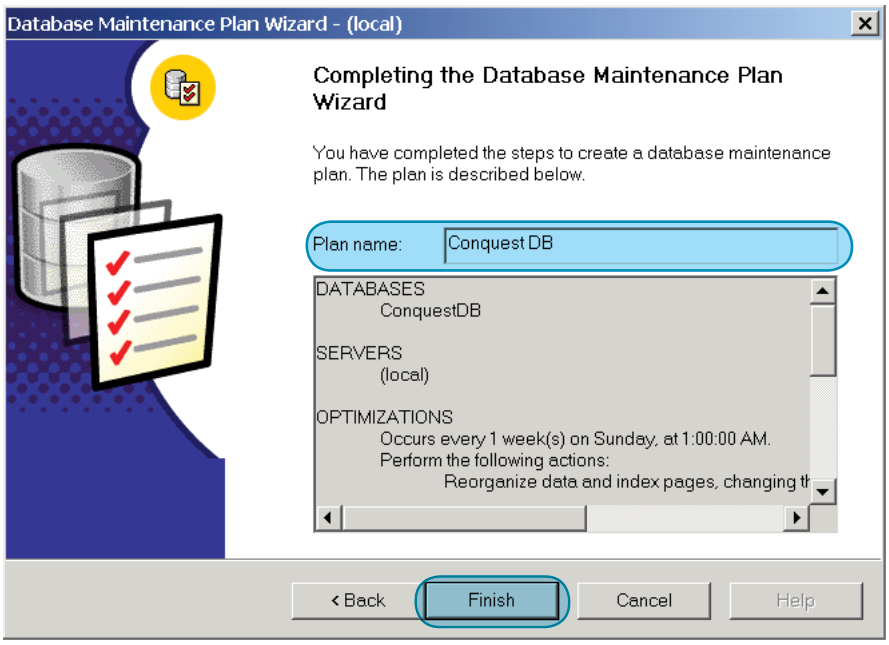

Database Maintenance Plan Wizard - (local)
Reports to Generate
Specify the directory in which to store the reports generated by the maintenance plan.
Write report to a text file in directory:
C:\MSSQL\BACKUP\
Delete text report files older than:
4
Week(s)
Send e-mail report to operator:
New Operator...
< Back
Next >
Cancel
Help

SendSuite Database Maintenance

Creating a Database Maintenance Plan

NOTE: It is highly recommended that the backup files be saved or transferred to other locations such as a ZIP disk or other removable storage media.

35. Accept the defaults on the **Maintenance History** dialog box and click Next.
36. Enter a **Plan name**. For example, **Conquest DB**.



37. Scroll through the screen to review the summary.
38. Click **Finish**. The following message is displayed:

    Successfully created the maintenance plan.

SendSuite Database Maintenance

Creating a Database Maintenance Plan

Editing the Database Maintenance Plan

1. From the Windows® Start menu, click **Programs > Microsoft SQL Server** > **Enterprise Manager.**
2. Double-click **Microsoft SQL Servers**.
3. Double-click **SQL Server Group**.
4. Click your PC name to expand the folder.
5. Click **Management** to expand the folder.
6. Right-click **Database Maintenance Plans**. The plan displays in the right pane.
7. Right-click the plan and select **Properties**.

   The plan is displayed for editing. Anything selected during setup can be changed on this screen.

Viewing History of the Database Maintenance Plan

1. From the Windows® Start menu, click **Programs > Microsoft SQL Server** > **Enterprise Manager.**
2. Double-click **Microsoft SQL Servers**.
3. Double-click **SQL Server Group**.
4. Click your PC name to expand the folder.
5. Click **Management** to expand the folder.
6. Right-click **Database Maintenance Plans**. The plan displays in the right pane.
7. Right-click the plan and select **Maintenance Plan History**.

   This is useful for troubleshooting problems with the backup procedure.

SendSuite Database Maintenance

Understanding the Transaction Log

The transaction log is a record of all modifications — inserts, updates, and deletes — that have occurred in the database. The transaction log is used in case a database is badly damaged. A user could recover all or most of the same data using the transaction log. (The user could restore the previous day's database, apply the transaction log, and have no data lost.) The transaction log is also used for debugging purposes. Because changes to the database are not necessarily written to disk immediately, this log is the only means whereby transactions can be recovered in the event of a system failure.

If a data file is damaged and must be restored from backup, all of the transactions that have occurred on that data file must be replayed to recover the database to the point just before the failure. Because the transaction log is critical for this process and has limited space, transaction log backups must be performed. You must save all of the transaction log data that has been generated since the last backup to recover the database.

The default setting is to Automatically Grow file by 10 Percent with unrestricted file growth.
Depending on the number of changes to your database, with the default setting, the transaction log can grow to be quite large. Because the transaction log is a finite set of one or more files, it will eventually be filled and therefore must be truncated periodically. The log is automatically truncated at the completion of a log backup.

Although the log is truncated during the backup, its physical size is not affected. For example, if you allow the transaction log to grow to 600MB, then truncate it, its file space being used might be 20MB, but it still takes up 600MB of space on the disk. You can shrink the size of the log file. Refer to on-line help on Microsoft SQL Server for additional instructions.

It is important that you set up the database maintenance plan in order to control the disk space usage. Do not delete log files. See *Creating a Database Maintenance Plan* on page 1-8. You also can refer to Microsoft SQL Books Online for information on Optimizing Transaction Log Performance.

SendSuite Database Maintenance

Backing Up Other Critical Information

Some critical data is not stored in the database. Make sure you have a backup of the following directories as well:

- C:\Documents and Settings\All Users\Pitney Bowes\SendSuite Shipping\Rates — This directory, with its sub-directories, contains binary rate tables used for rating shipments.
- C:\Documents and Settings\All Users\Pitney Bowes\SendSuite Shipping\dat — This directory contains files used to calculate expected delivery dates, geographic locations, and carrier label formats.
- C:\Documents and Settings\All Users\Pitney Bowes\SendSuite Shipping\rpt — This directory contains the format files needed to print SendSuite reports and .rpx files used for any Active X reports.
- C:\Documents and Settings\All Users\Pitney Bowes\SendSuite Shipping\rpx — This directory contains any custom reports that you create.

Restoring the SendSuite Database

Restoring the SQL Database

If necessary, you can restore the SendSuite Database from a backup file. Restoring the database may be necessary for a number of reasons, but it should only be done when other options have been exhausted.
When you restore the SQL database, you replace all the current records with what is in the backup file. That means, if you entered new data since the last backup, when you restore the database, you will lose that new information.

Complete the steps below to restore your backup data using SQL 2000. This procedure restores the database that holds the shipment processing records, in addition to other data stored in the SendSuite Database.
This procedure does not restore the SendSuite setup data, which includes the system's carrier rates, report formats, and other data, find and restore those folders. See *Backing up other Critical Information* on page 1-22 for more information.

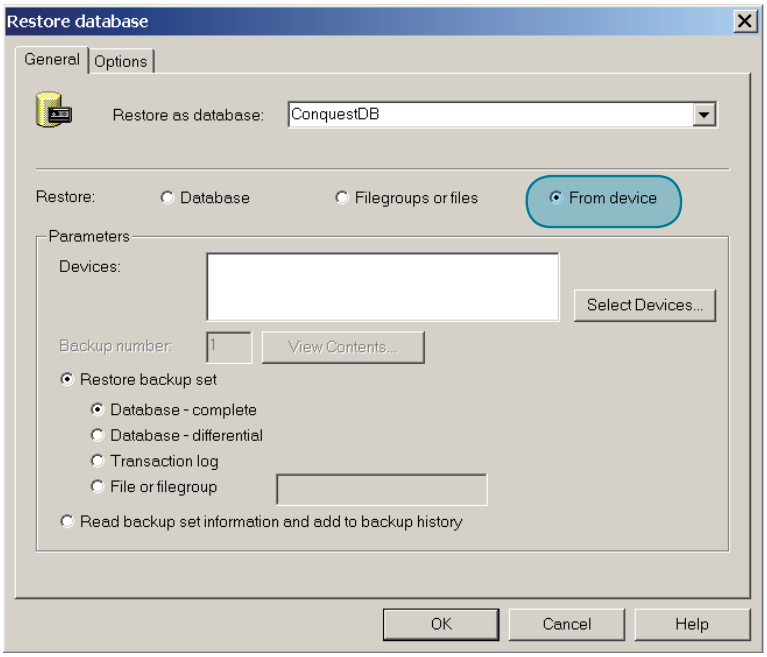
To restore the SQL database:

1. Copy the backup file to the **MSSQL Backup** folder. For example, **C:\MSSQL7\Backup\MyBackup.bak**.
2. From the Windows® Start menu, click **Programs > Microsoft SQL Server** > **Enterprise Manager.**
3. Double-click **Microsoft SQL Servers**.
4. Double-click **SQL Server Group**.
5. Click the **+** sign next to the **Server Name** and highlight the server name.
6. Click the **+** sign next to the **Databases** folder.
7. Select **ConquestDB**.
8. From the **Tools** menu, select **Restore Database**.

Restoring the SendSuite Database

Restoring the SQL Database

9. Select **From device**.



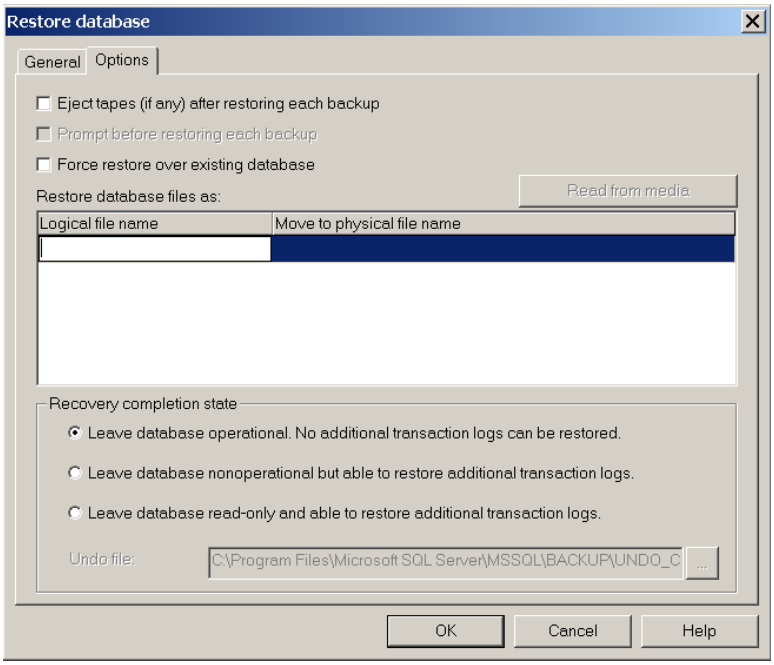
10. Click the **Select Devices** button to specify the device and its path.
11. From the Choose Restore Devices dialog box, click **Add**.
12. Select the Restore destination by clicking ... to search for the file name.
13. From the Backup Device Location dialog box, enter the appropriate file name in the File name field and click **OK**. For example, **MyBackup.bak**.

    The Device name should display on the Choose Restore Destination dialog box.
14. Click **OK**.
15. From the Choose Restore Devices dialog box, click **OK**.

Restoring the SendSuite Database

Restoring the SQL Database

16. Click the **Options** tab and review the restore options.


Restore database
General
Options
Eject tapes (if any) after restoring each backup
Prompt before restoring each backup
Force restore over existing database
Restore database files as:
Read from media
Logical file name
Move to physical file name
Recovery completion state
Leave database operational. No additional transaction logs can be restored.
Leave database nonoperational but able to restore additional transaction logs.
Leave database read-only and able to restore additional transaction logs.
Undo file:
C:\Program Files\Microsoft SQL Server\MSSQL\BACKUP\UNDO_C
...
OK
Cancel
Help

17. Click **OK**. The Restore process begins.

    When the backup process is complete, the following message is displayed:

    Restore of database 'ConquestDB' completed successfully.

18. Click **OK** to clear the message box.
19. From the **Tools** menu, select **SQL Query Analyzer**.
20. Click the **Open** button.
21. Find DBSync.sql.
22. This file resets the users on the ConquestDB and Master databases. The file can be found in C:\Program Files\PBTranscape\Conquest\CQAttach\. Open the file and execute it.
22. Close the Query Analyzer and Enterprise Manager.

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Consignee Data

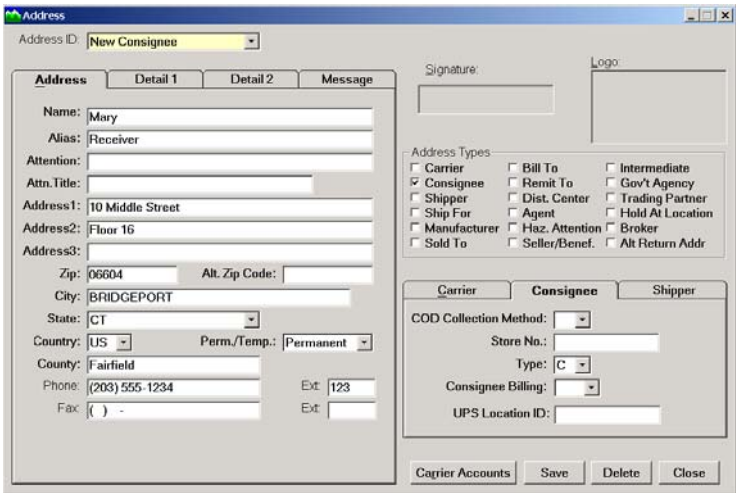
Adding a Consignee

In SendSuite, the Consignee represents the party that the shipment is going to. Consignee information is stored in ***tblAddress***. The information also may display on the shipping screen, although the shipping screen is using ***vConsignee***.

Complete the following steps to add a consignee while in the Supporting Data module.

To add a consignee:

1. Open the **Data** folder in the **Supporting Data Selection** window.
2. Double-click **Address**.
3. Click the blank record icon. 
4. Type the new consignee's I.D. in the **Address ID** field.
5. Check the box to the left of **Consignee**.
6. Click the **Address** tab.
7. Type the new consignee's address information in the appropriate fields.



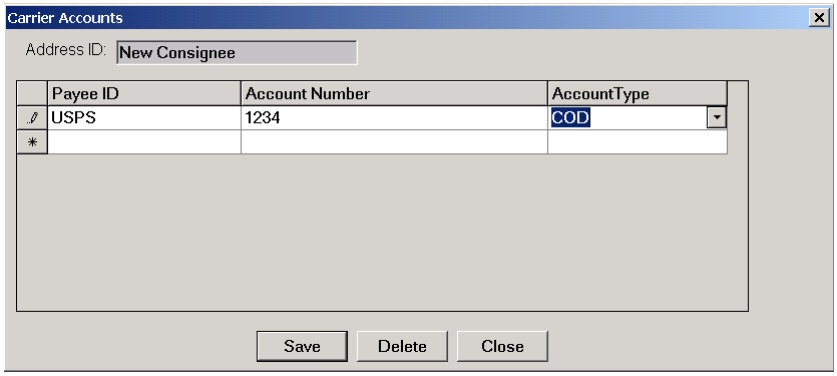
8. Click the **Detail 1** tab.
9. Populate the appropriate fields on the **Detail 1** tab.
10. Click the **Detail 2** tab.
11. Populate the appropriate fields on the **Detail 2** tab.
12. Click the **Message** tab.
13. If necessary, type an alert message to be displayed when shipping to this consignee.
14. Click the **Consignee** tab.
15. Populate the appropriate fields on the **Consignee** tab.
16. Click the **Save** button.

Consignee Data

Adding a Consignee

NOTE: You must install the carrier before setting up its accounts. See *SVTS9129* for more information on installing carriers.

17. If this consignee has an account with a specific carrier, then:
    a. Click the **Carrier Accounts** button.
    b. Click the drop-down arrow in the **Payee ID** field.
    c. Type the consignee's account number with that carrier in the **Account Number** field.



    d. Click the **Save** button.
    e. Click the blank record icon and repeat steps **a** through Step **d** to add any additional carrier accounts.

18. Click the **Save** button in the **Address** window.

Country Data

NOTE: You can override the number of copies by printing the documents to the screen and changing the number of copies.

The Country table contains all the known 2-character ISO country codes. These codes link to all addresses used for shipping. Most of this data is pre-populated by Pitney Bowes and should not be modified.

You can make the following changes on the country table:

- You can identify which documents need to be printed for each country. To do so, type 1 in the field for the number of copies (see below).

  When you do this, there is no need to check the document boxes on the shipping screen. The system will look at ***vConsignee.ConsISOCountryCode*** and relate that to the flag on ***tbl.Country***.

- You can specify the number of copies of each document you want to print.

  This process only works with if the Print International Docs event or sub-event is set to print to the printer. See *Processing Events* in Chapter 3 of this guide.

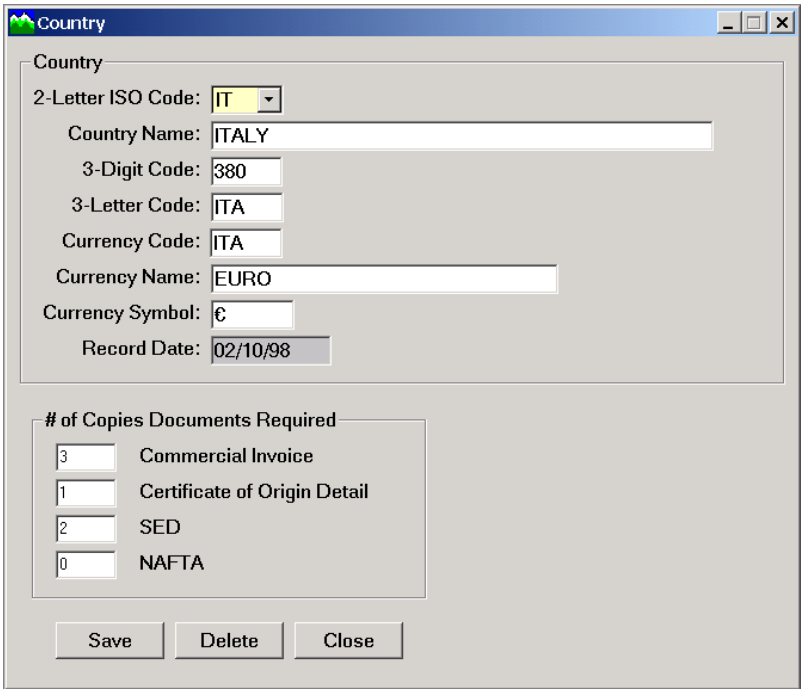
Country Data

Modifying Country Data

To modify country data:

1. On the Administrative Workstation, open the **Supporting Data** module.
2. Double-click the **Data** folder.
3. Double-click **Country**.
4. Select the country.
   - Type the 2-digit ISO country code in the field provided, then press **Tab**.

     - OR -
   - From the drop-down, select the country you want to modify.



5. In the # of Copies Documents Required box, type the default number of copies for each type of document.
6. Click **Save**.

Commodity Data

Adding a Commodity Code

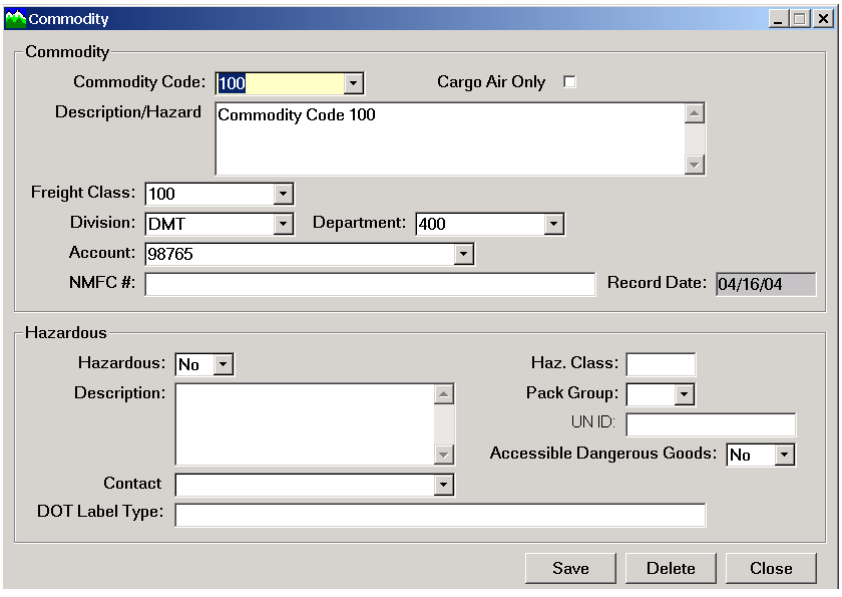
The commodity code is stored in ***tblCommodity***. The commodity code is related to a value on ***tblFreightClass***. SendSuite uses the freight class to query LTL tariffs.

In order to use LTL class tariffs, each line on the shipping screen must have a commodity code.

When SendSuite prints the bill of lading, it references ***tblCommodity*** by the Commodity Code, then imports the description and freight class to the bill of lading. The commodity code does not appear on the bill of lading. If you want the code to appear, then you can make it part of the Description.

To add a commodity while in the Supporting Data module:

1. Open the **Data** folder in the Supporting Data Selection window.
2. Double-click **Commodity**.
3. Click the blank record icon. 
4. Populate the following fields:
   - Commodity Code
   - Description/Hazard Info
   - Freight Class
   - Division



5. If necessary, populate the other fields listed in the Commodity window.
6. Click **Save**.

Product Data

Adding a Product

Product information is used when printing export documentation. Product fields are found on ***tblShipmentLine*** and ***tblIntlLine***.

Product information can be stored in SendSuite in ***tblProduct***. The data in this table is linked to the tables used in shipping.

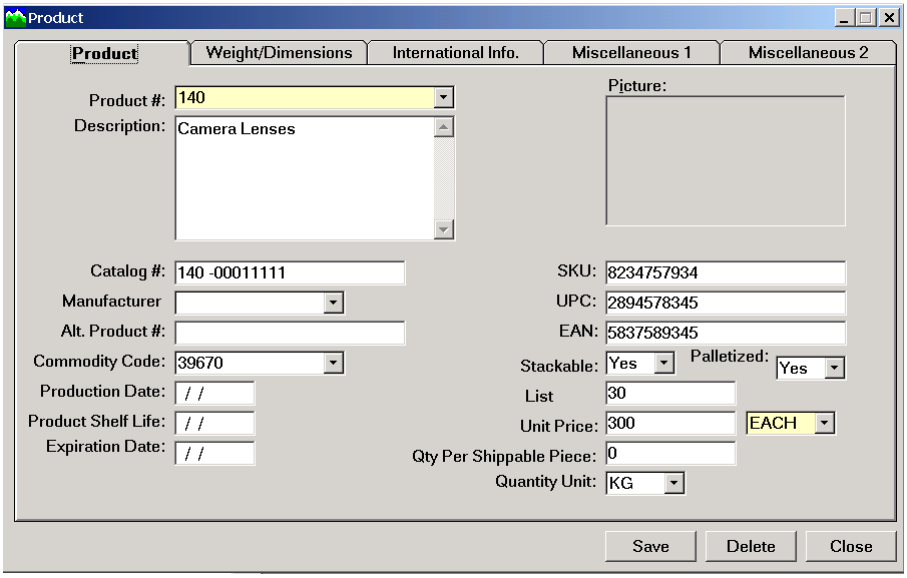
You can set up your integration with SendSuite to map data directly to ***tblProduct***, but it is not necessary to do so. All export documents will print using the data on ***tblIntlLine***.

Adding product information to SendSuite is optional. Adding these records allows you to quickly insert information into shipping lines when you are processing a shipment. When you select a product, other line item fields may populate automatically, saving time and minimizing data entry errors.

When processing international shipments, a great deal of product information is required. By populating the product table, you can save valuable time.

To add a product while in the Supporting Data module:

1. Open the **Data** folder in the **Supporting Data Selection** window.
2. Double-click **Product**.
3. Click the blank record icon.
4. Type the product name or number in the **Product #** field.



5. Input other fields as necessary (see Chapter 2 of this guide).
6. Click **Save**.

Product Data

Adding a Product

Product Fields

The only required field to input a product is the Product # field. The following fields will be brought over to the shipping line when the product number is entered in the shipment processing screen. To bring these fields over, the shipment processing screen must be set up to retrieve information from ***tblProduct***. (See *Field Properties* in Chapter 3 of this guide.)

tblProduct	tblShipmentLine
Description	ItemDescription
CommodityCode	CommodityCode
Weight	Weight
Length	Length
Width	Width
Height	Height
Volume	Volume

Product Data

Adding a Product

International Products

For international shipments, the following fields will be brought over into shipping if the product number is input in the International Detail window.

tblProduct	tblIntlLine
ProductNr	ProductNr
Description	ProductDescription
ISOCountryCode	CountryMfg
UnitPrice	UnitPrice
PricingUnit	PricingUnit
Weight	NetWeight (this is the product of product weight * quantity)
WeightUnit	WeightUnit
ECCN	ECCN
HTSNr	HTSNr
HTSDescription	HTSDescription
HTSQuantityUnits	HTSQuantityUnits1
HTSQuantityUnits2	HTSQuantityUnits2
LicensedProduct	LicensedProduct
NAFTALevel	NAFTALevel
NAFTANetBeginDate	NAFTANetBeginDate
NAFTANetEndDate	NAFTANetEndDate
NAFTAPrefCrit	NAFTAPrefCrit
NAFTANetCost	NAFTANetCost
SEDLicense	SEDLicense

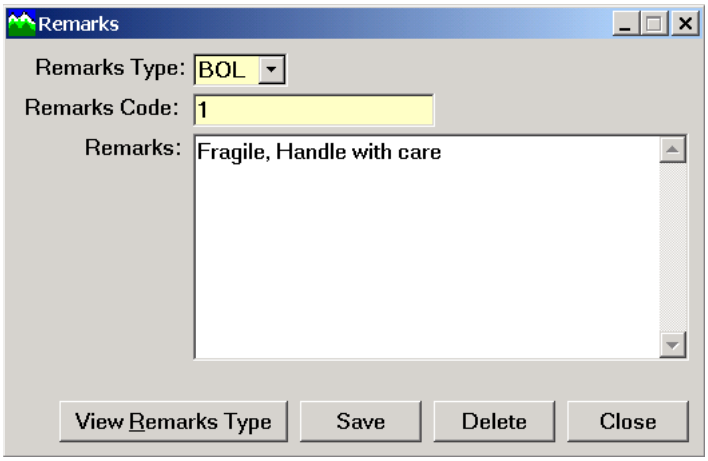
Remark Codes

Adding a Remark Code

On the shipping screen SendSuite, you can type a code that will import remarks to print on the bill of lading. These codes are stored in tblRemarks.

To add a remark code:

1. Open the **Supporting Data** module from the Control Center.
2. Open the **Data** folder in the Supporting Data Selection window.
3. Double-click **Remarks**.
4. Click **View Remarks Type**.
5. Select **BOL**.
6. Click **OK**.
7. Type a unique code to identify the new remark in the **Remarks Code** field.



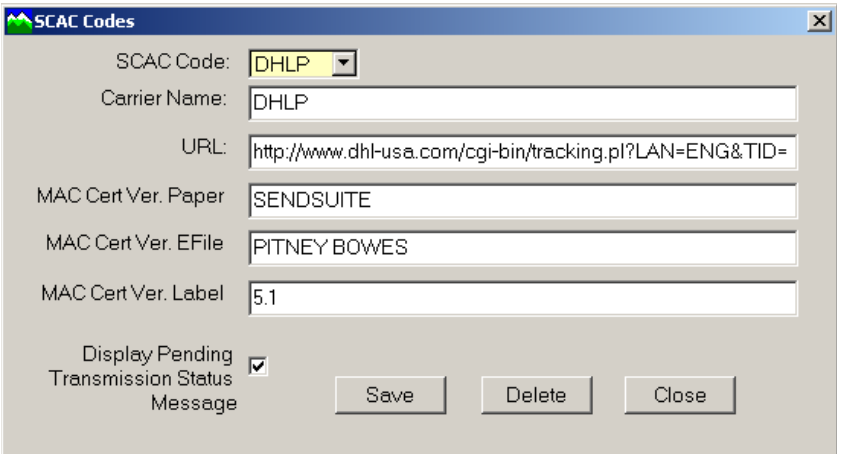
8. Type the specific remark in the **Remarks** field.
9. Click **Save**.

Standard Carrier Alpha Codes (SCAC)

SendSuite carrier tariff records and address records require a Standard Carrier Alpha Code (SCAC). These values are saved on tblCarrierSCAC.

To input a new SCAC:

1. Open the **Supporting Data** module from the Control Center.
2. Double-click the **Carrier & Labels** folder.
3. Double-click **SCAC Codes**.
4. Click the **New** button on the tool bar. 
5. Type the SCAC code in the **SCAC Code** field.



6. Type the carrier's name in the **Carrier Name** field.
7. *Optional*: You can add the carrier's URL. This information links to the Web Track feature on the shipping screen.
8. *Optional*: You can add information for the carrier's MAC certification.
9. *Optional*:Select **Display Pending Transmission Status Message** to enable pending transmission messages on the thin-client workstation (for this SCAC code only).
10. Click **Save**.

NOTE: MAC certification is used by the United States Postal Service for manifesting, analysis, and certification purposes.

Shipper Alert

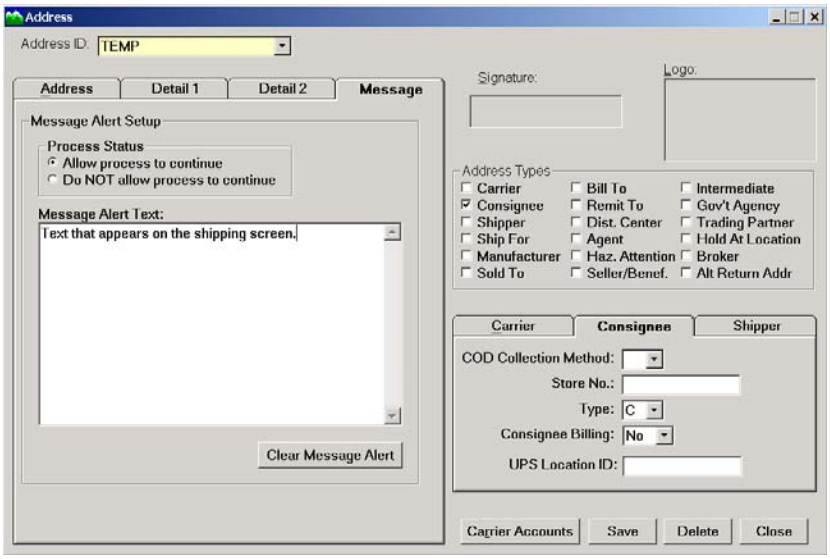
Creating a Shipper Alert

A shipper alert is a message that will appear in the shipping screen when a specific consignee is selected. The shipper alert must be part of the consignee address record before the user accesses the record. For example, if you bring consignee data as part of an ODBC integration script, the consignee data is written at the same time the shipment is written. Therefore, the user is not *selecting* the consignee record, and the shipper alert will not display.

If you add a shipper alert to an address record following the instructions below, SendSuite will overwrite the alert when a new ODBC script is run. To retain a shipper alert message with ODBC integration, the message must be part of the data map.

To manually attach or remove a message from a consignee address record:

1. Open the **Supporting Data Module** from the Control Center.
2. Double-click **Address**.
3. Click the drop-down arrow in the **Address ID** field and select the consignee.
4. Click the **Message** tab.



5. Type your message in the **Message Alert Text** field.
6. *If* you want SendSuite to display the message and prevent the shipping operator from further processing the shipment, *then* click the circle next to **Do NOT allow process to continue**.
7. Click **Save**.

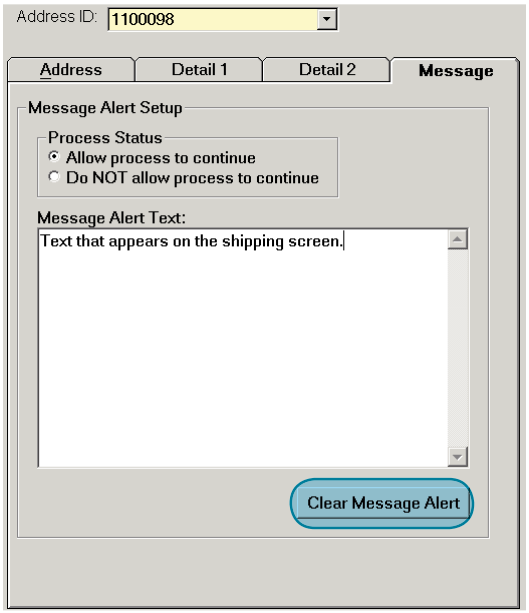
NOTE: There is no override in the shipping screen to allow a shipment to be processed. To process shipments for that consignee, you must click the Allow process to continue circle or delete the shipper alert. See *Deleting a Shipper Alert* in Chapter 2 of this guide.

Shipper Alert

Deleting a Shipper Alert

To delete a shipper alert:

1. Open the **Supporting Data Module** from the Control Center.
2. Click the drop-down arrow in the **Address ID** field and select the consignee.
3. Click the **Message** tab.
4. Click the **Clear Message Alert** button.



5. Click **Save**.

Shipper Handling Fees

Handling charges are referred to as shipper charges. Handling charges can be set up to be applied globally or can be set up to specific consignees. There are many ways a shipper may want to apply a handling fee.

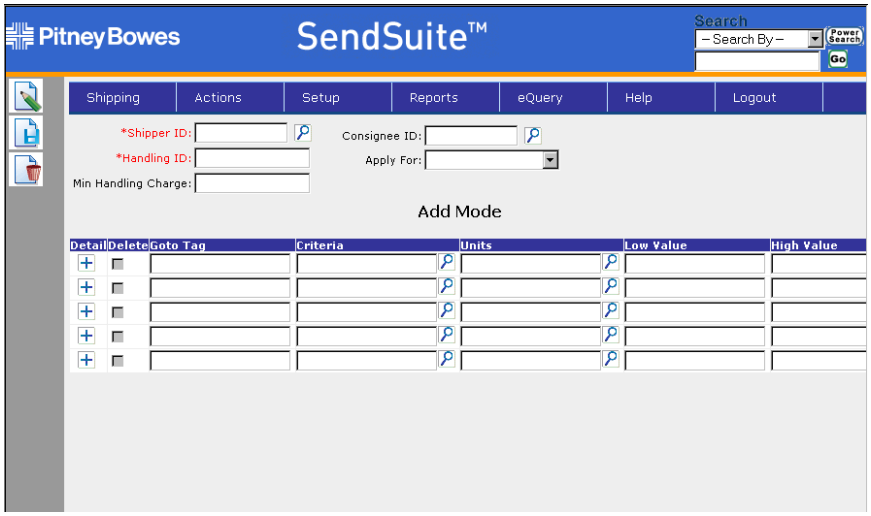
For example:

- If the carrier is ABC and the service is GRD, apply a 5% handling fee to the gross freight charge.
- If the carrier is ABC and the service is NAM, apply a 10% handling fee to the net freight charge.
- If the commodity 123 is ordered and the dollar amount of the order is less than $100, apply a $5 handling fee.
- If the commodity 123 is ordered and the dollar amount of the order is between $100 and $500, apply a $10 handling fee.

NOTE: When you process shipments, the handling charge displays in the Shipper Costs field of the Freight Costs tab.

To set up a handling fee:

1. Click **Setup > Data… > Shipper Handling Fees**.



2. Click the **Lookup** icon next to the Shipper ID and select the appropriate shipper record.

   NOTE: A series of records can be entered so that different handling charges can be assessed to different consignees. This indicates that this is the global handling charge to be applied to all consignees. There can be only one global record for each shipper. For a global record, you do not select a Consignee ID.
   If you want to make the handling charge consignee specific, from the Consignee ID list, select the consignee.

3. Type a name in the **Handling ID** field.
4. If appropriate, enter a Minimum Handling Charge. The minimum handling charge is applied if the shipment doesn't meet the select criteria specified.

Shipper Handling Fees

NOTE: You can also specify handling charges to be a percentage of the cost of goods instead of a flat dollar amount.

5. From the Apply For drop-down list, select the application type.
   - P — criteria and action evaluated per piece
   - S — criteria and action evaluated for shipment totals
6. After entering the header information, click **Save** .
7. Build a table of criteria ranges and the associated handling charge.

   You can enter the information directly on the grid or you can click **Detail** and enter the information on the Shipper Handling Fee Detail screen.

   Example: If the cost of goods is between 1.00 and 49.99 dollars, apply an additional 10.00 dollar handling charge. If the cost of goods is between 50.00 and 99.99 dollars, apply a 20.00 dollar handling charge.

Field Definitions	
Goto Tag	Identifies this location as the start of a subset of handling rules.
Criteria	Identifies which shipment information will be used to make comparisons for handling decisions. For example, **COST OF GOODS**.
Units	Used to further specify information about the criteria for weight types.
Low Value	Low comparison value for range-based criteria or exact match for text criteria.
High Value	High comparison value for range-based criteria only.
Action	Defines an action that is to be performed if the criterion evaluates to true. This may be used to calculate a handling charge or to skip to a section defined by a **TAG**. For example, **Flat Amount**.
Parameter	This is a flat amount or percentage used to compute the handling charge, or a **TAG** to refine the handling instructions.

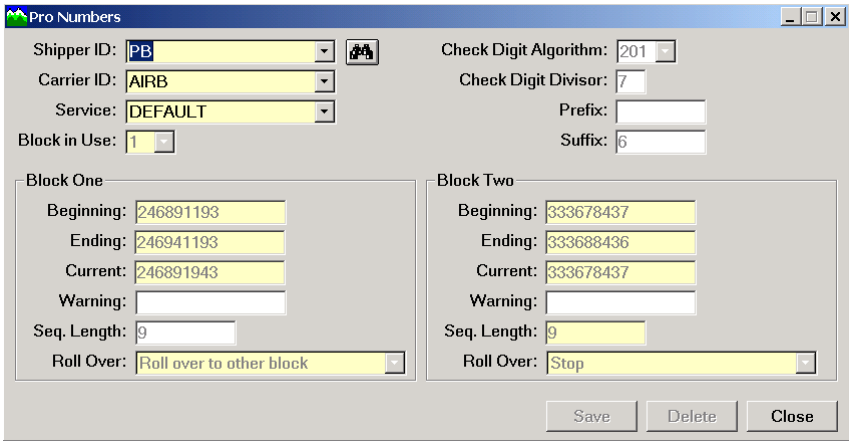
8. Click **Save** to save any entries or changes you have made.

Setting Up PRO Numbers and Tracking Numbers

NOTE: If SendSuite generates a PRO number or tracking number for all your shipments, you must set up PRO numbers or tracking numbers for every carrier.

To input your carrier PRO numbers and tracking numbers:

1. Open the **Supporting Data** module from the Control Center.
2. Open the **Carrier & Labels** folder.
3. Double-click **Pro Numbers**.



4. If you are inputting PRO numbers for a new carrier, follow these steps:
   a. Click the **New** button.
   b. Click the binoculars button and select the shipper.
   c. Type or select the carrier ID in the **Carrier ID** field.
   d. Type or select the service that the pro numbers will to in the **Service** field.
   e. Click the drop-down arrow in the **Check Digit Algorithm** field and select the configuration that meets your carrier and service.

> **NOTE:** If you do not need PRO numbers or tracking numbers for this carrier, then select **No pro number for this carrier/ service**. You may save the record at this point; do not complete the rest of the fields.
> If you determine the PRO number at the time of shipment (for example, if you use labels or the PRO number is given to you by the truck driver), select **Prompt for PRO numbers**. You may save the record at this point; do not complete the rest of the fields.

5. Type or select the block number you will be using in the **Block in Use** field.
6. Type the first number in the **Beginning** field.
7. Type the last number you were given in the **Ending** field.
8. Type the next number you will use in the **Current** field.

Setting Up PRO Numbers and Tracking Numbers

9. If you want SendSuite to warn you when you are getting low on numbers, type the warning number in the **Warning** field.
10. In the **Roll Over** field, select an option that will tell SendSuite what to do when it reaches the ending number in that block.
    - **Roll over to other block** — When the last number is used, SendSuite will start using the numbers in the other block.
    - **Roll over and reset** — When used for Block 2, SendSuite will notify you that you have depleted your numbers in both blocks. If you input new numbers in Block 1, SendSuite will automatically roll over and start using those numbers.
    - **Start over at block's beginning** — When the last number is used, SendSuite will go back and start from the beginning number. SendSuite will re-use the numbers in the block.
    - **Stop** — When the last number is used, SendSuite will alert you that you have used the last number and will not allow you to process another shipment for that carrier until new numbers are input.
11. Click the **Save** button.
12. Click the **Close** button.

Rate Shop Groups

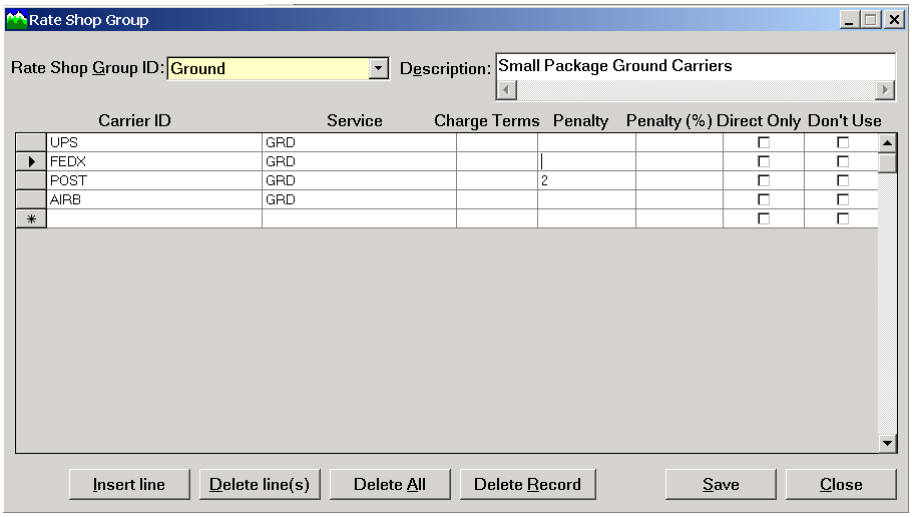
Creating Rate Shop Groups

Rate shop grouping allows you to specify a set of carriers or carrier services to be used in the rating process. You can also add a drop-down list of rate shop groups to your shipping template.

Rate shop groups can also be used with routing instructions associated with a shipper or consignee.

To create rate shop groups:

1. Open the **Supporting Data** module from the Control Center.
2. Double-click the **Shipment Planning Setup** folder.
3. Double-click **Rate Shop Group**.



4. Type the name of the group in the **Rate Shop Group ID** field.
5. Type a description of the rate shop group in the **Description** field (optional).
6. Select a carrier from the **Carrier ID** drop-down list.
7. Select the carrier service from the **Service** drop-down list (optional).
8. Select the carrier charge terms from the **Charge Terms** drop-down list (optional).
9. The **Penalty** and **Penalty (%)** fields are used for Dual Rating. See *Dual Rating* in Chapter 2 of this guide.
10. Select the checkbox under **Direct Only** to screen-out any interline shipments for this carrier (optional).
11. Select the checkbox under **Don't Use** to have SendSuite skip this carrier during the rating process.
12. Repeat steps 6 through 11 for all the carriers you want in your rate shop group.
13. Click the **Save** button.

NOTE: It is a good idea to describe your rate shop group for future reference. Including a description of the logic used to create the group will be helpful for others.

NOTE: Using the Don't Use field gives you the flexibility of changing the rate shop group quickly in the future. If you decide to change the makeup of your rate shop group, you can simply check the boxes under **Don't Use** instead of having to insert or delete lines.

Rate Shop Groups

Dual Rating

When you perform the Rate event on the SendSuite Shipping workstation, SendSuite Shipping selects the carrier with the lowest routing cost. Without using a rate shop group, the *routing* cost is the same as the net freight.

You can using the rate shop group to modify the routing cost, affecting how SendSuite Shipping rates a shipment.

For example, if Joe's Trucking and Fred's trucking charge similar rates, but you prefer to use Joe's, then you can use dual rating so SendSuite Shipping selects that carrier more often than it selects Fred's. Using the rate shop group feature, you can make Joe's rates look 10% less expensive than Fred's. The routing cost will *not* display on the screen for the user.

To set up dual rating:

1. Follow the instructions in Chapter 2 to set up the rate shop group.
2. If you want the routing cost to be based on a flat amount, type that amount in the **Penalty** field. For example, if you want Joe's to look $10 cheaper than Fred's, type **-10** in the **Penalty** field.
3. If you want the routing cost to be based on a percentage, type that percentage in the **Penalty (%)** field. For example, if you want Joe's to look 10% cheaper than Fred's, type **-10** in the **Penalty (%)** field.

Routing Instructions

Setting Up Routing Instructions

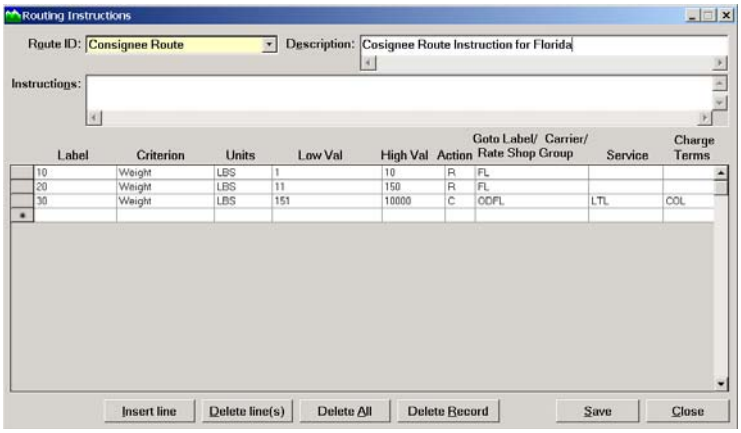
Routing instructions specify how shipments will be routed and rated for a particular shipper, agent, consignee, bill-to, or ship-for parties. You can use routing instructions to select carriers and rates.

You can specify the priority for determining which routing ID to assign to a shipment based on charge terms by setting up route priorities.

You can also add a field to your shipment processing screen, allowing your shipping operator to type or select a routing instruction during shipping.

To set up routing instructions:

1. Open the **Supporting Data** module from the Control Center.
2. Double-click the **Shipment Planning Setup** folder.
3. Double-click **Routing Instructions**.



4. Type a unique ID or name for the routing instructions in the **Route ID** field.
5. Type a description for the routing instruction in the **Description** field (optional).
6. Use the **Instructions** field to display a pop-up message when using the **Call For Instructions** Action in Chapter 2 of this guide. Type the message you want to appear in this field.

> **NOTE:** Although optional, a detailed description is very helpful for future reference or for others who want to understand the purpose of the routing instructions. Explaining the logic used to create the routing instruction would be a helpful description.

7. Click the cursor in the **Label** column of the instruction line.

NOTE: The label lines need to be in order from the first one you want to check to the last one. SendSuite Shipping will stop when it reaches the first true condition in the routing instruction.

Routing Instructions

Setting Up Routing Instructions

NOTE: You can use a descriptive term (such as Oversized) or just a letter or number (a, b, c or 1, 2, etc.).

8. Type the label.
9. Populate the following fields:
   - **Criterion**—Click the drop-down list and select the field SendSuite Shipping should look for when applying the routing instruction.

     NOTE: If you select **Default** as the criterion, do not tab past the **Units** field. If you do tab past the **Units** field, SendSuite Shipping will force you to select a specific carrier and will not allow you to default to all carriers.
     If you accidentally tab into the next fields, you will get a series of error messages. Click **OK** to exit these messages. Then, delete the line you created and start again.

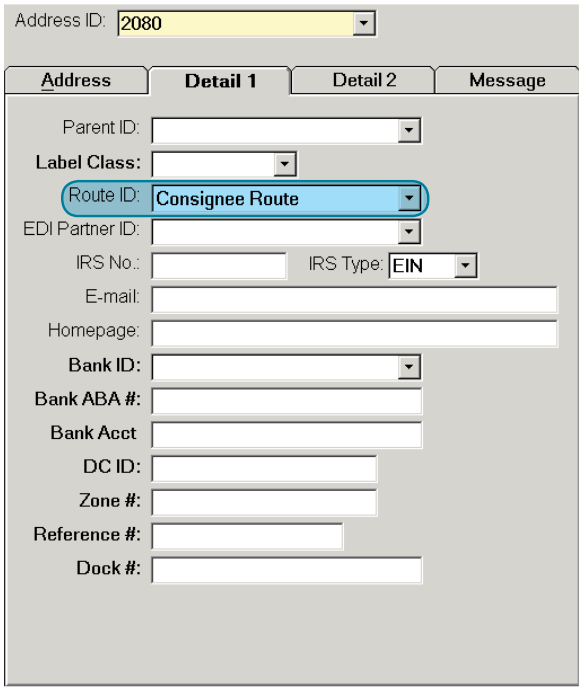
   - **Units** — Select the unit of measurement to use, if applicable.
   - **Low Val** — Enter the lowest value for which you want this instruction to be used to rate shipments.
   - **High Val** — Enter the highest value for which you want this instruction to be used to rate shipments, if applicable.
10. Click the cursor in the **Action** field.
11. Click the drop-down arrow in the **Action** field and select one of the following actions:
    - **G** — The **Go to Label** refers to another line in your routing instructions.
    - **C** — The **Assign Carrier** assigns a specific carrier or service.
    - **R** — The **Rate Shop Group** assigns a rate shop group.
    - **I** — The **Call for Instructions** displays a pop-up message containing the text entered in the Instructions field.
12. If you selected **G**, **C,** or **R** in the Action field, select one of the following items in the **Goto Label/Carrier/Rate Shop Group** field:
    - **G** — Type the name of the label you want the instructions to go to.
    - **C** — Select a specific carrier from the drop-down list.
    - **R** — Select a specific rate shop group from the drop-down list.
13. If you selected **C** in the Action field, you have the option to specify terms in the Service and Charge Terms fields (both fields are optional).
    - Select a specific carrier service to apply to the shipment.
    - Select charge terms to apply to the shipment.
14. Follow Step 7 through Step 13 for all additional conditions you want to apply to this set of instructions.
15. Click the **Save** button to save the routing instructions.
16. Click **Close** to exit the routing instruction window.

Routing Instructions

Applying Routing Instructions to a Consignee, Agent, or Shipper

To apply routing instructions to a consignee, agent, or shipper:

1. Open the **Supporting Data** module from the Control Center.
2. Double-click **Data**.
3. Double-click **Address**.
4. From the **Address ID** drop-down list, select to whom you want to assign the routing instructions.
5. Click the **Detail 1** tab.



6. From the **Route ID** drop-down list, select the ID for the routing instructions you want to assign.
7. Click **Save**.

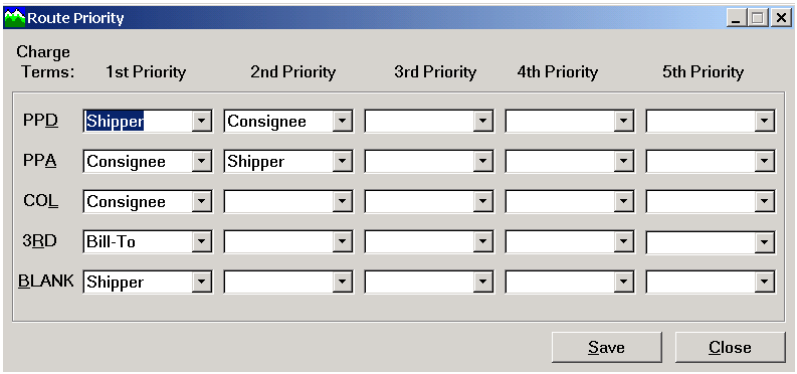
Routing Instructions

Setting Routing Instruction Priority

Routing Priority *must* be configured for Route IDs to function properly. The priority indicates which routing instruction will be applied if a conflict occurs (for example, if there is a Route ID for both the Consignee and the Shipper).

To set routing instruction priority:

1. Open the **Supporting Data** module from the Control Center.
2. Select **Route Priority** from the Setup menu.



3. For each of the Charge Terms, indicate the order in which SendSuite Shipping should apply routing instructions. For example, prepaid packages may use the shipper as first priority and consignee second. However, collect shipments may use the consignee instructions first and shipper second.
4. Click **Save**.
5. Click **Close**.

Adding a Route ID Field to the Shipment Processing Screen

You can add a lookup button on the shipping screen so the user can select a route manually. See *Configure the Appearance of the Shipping Screen* in Chapter 3 of this guide.

Batch Rating

While most packages or shipment are processed one at a time, there may be a need to process a group of packages all at once. SendSuite Shipping supports this need with its Batch Rating Feature.

Batch Rating can be done the following ways:

- It can be done on the Shipping Workstation.
- Interactive batch rating can be done through the use of a script.
- It can be done as part of a scheduled task on the Administrative Workstation. See *Task Scheduler* in Chapter 5 of this guide.

\
This document provides an explanation of what happens during the batch rating process.

Groups

To rate shipments in a batch, they must first be grouped. When you create a group, a new record is written to ***tblGroup***. The Group ID is also saved with the shipments on ***tblShipmentHeader***, ***tblLoad***, and ***tblStop***.

Plan Shipments

When you execute the batch rating feature, it rates each shipment individually. Please note the following conditions:

- It does not pick up any routing instructions.
- It will rate and save multipiece parcel shipments as a single shipment (instead of using the MultiPack feature).
- If there is a pre-specified carrier or service, it will use that information (for example, if the shipment was saved with a NAM service, then it will be rated using a NAM service).

Once the shipments have been rated, it will attempt to consolidate shipments going to the same destination. It will attempt this consolidation when there is no pre-specified carrier or when the shipments have a common carrier. Consider the following examples:

- Three shipments with no pre-specified carriers were grouped and rated. One shipment was routed using Courier A, the second was routed using Courier B, and the third was routed using Freight Carrier C. The system determined that it is more cost effective to combine all the shipments into one shipment using Freight Carrier C, so the first two shipments are re-rated and combined with the third shipment.
- Three shipments were grouped, each having Freight Carrier D already specified. The system routed and rated them individually, then it re-routed and re-rated them as a single shipment, combining their weight and pieces to achieve a volume discount.

Batch Rating

Plan Shipments

- Three shipments were grouped. One shipment had Courier A as a pre-specified carrier, the second and third shipment had no-specified carrier. The system routed the first shipment using the pre-specified carrier. The second shipment is routed using Courier B and the third shipment is routed using Courier C. The system then determined that the second and third shipments could be shipped more cost effectively using Freight Carrier D, so it re-routes and re-rates them. The first shipment is not consolidated because it had a pre-specified carrier.

Batch Labeling

Once the shipments have been routed and rated, you can print the labels in a batch. This process is done on the shipping screen by running a VBScript as a processing event. See *Writing a Script* in Chapter 8 of this guide for information on VBScripts, and see *Processing Events* in Chapter 3 of this guide for a description of how to create the shipping event.

Accounting Features

SendSuite Shipping includes accounting features that allow you to create accounts for tracking and reporting purposes. Account Sets defines the relationship between Accounts, Sub-Accounts, and Sub-Sub-Accounts. With this relationship, the you can have a hierarchical relationship between these fields, as defined by the Account Set.

Configuring Accounts and Account Sets

Creating Accounts

You must create Accounts (and optional Sub-Accounts and Sub-Sub-Accounts) before creating Account Sets. Use the Instructions below to create Accounts, Sub-Accounts and Sub-Sub-Accounts.

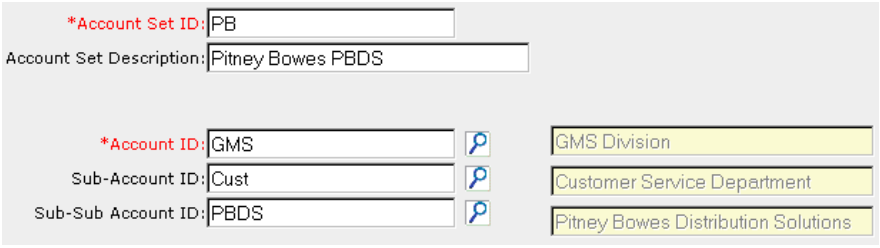
To create accounts:

1. Open the SendSuite Shipping thin-client and click **Setup** > **Data** and select either:
   - Account
   - Sub-Account
   - Sub-Sub-Account
2. Type an appropriate account and description, then click **Save**  .
3. Repeat steps 1 and 2 for every account you wish to create.

NOTE: Account Sets must be associated with a valid Account ID. Sub-Accounts and Sub-Sub-Accounts are optional.

Creating Account Sets

1. Open the SendSuite Shipping thin-client and click **Setup** > **Data** > **Account Sets**.



2. Type a new Account Set ID and **Description**.
3. Use the lookup icons  to search for an Account ID.
4. (optional) Use the lookup icons  to search for Sub-Account and Sub-Sub-Account IDs.
5. Click **Save**  .

Accounting Features

Account Validation

If you configure Account Sets for accounting use, the accounts can be validated per shipper ID. This is configured on the Address record (in the thin-client).

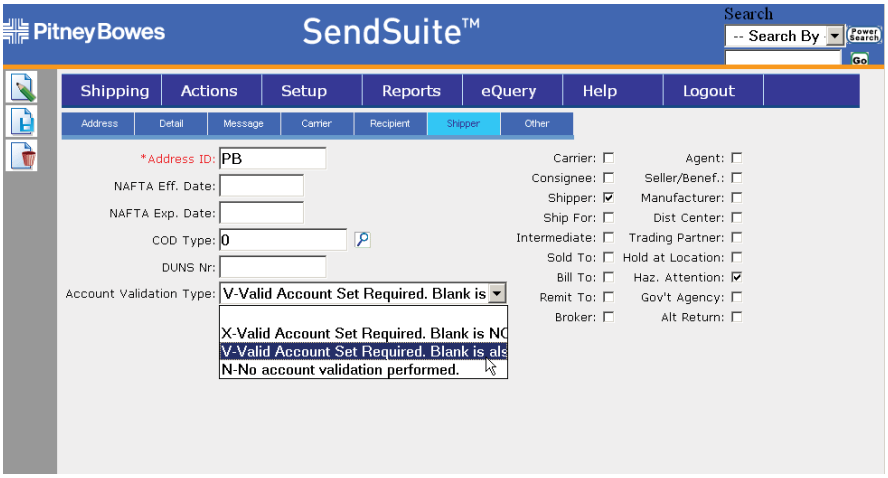
To configure account validation:

1. Open the SendSuite thin-client and click **Setup** > **Data** > **Address**.
2. Click the **Shipper** tab.
3. Select an Account Validation Type from the drop-down menu. (This field defaults to **V**.) Valid values include:

   V — The Account, Sub-Account, and Sub-Sub-Account selected must already exist as a valid relationship. A blank in the account set ID field is valid.

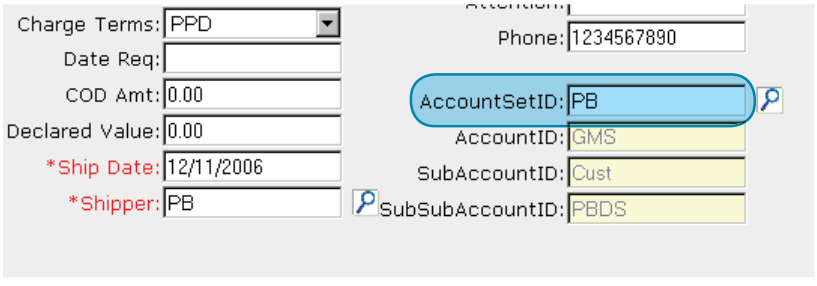
   X — The Account, Sub-Account, and Sub-Sub-Account selected must already exist as a valid relationship. A blank in the Account Set ID field is NOT valid.

   N — No validation is performed.



Using the Accounting Fields

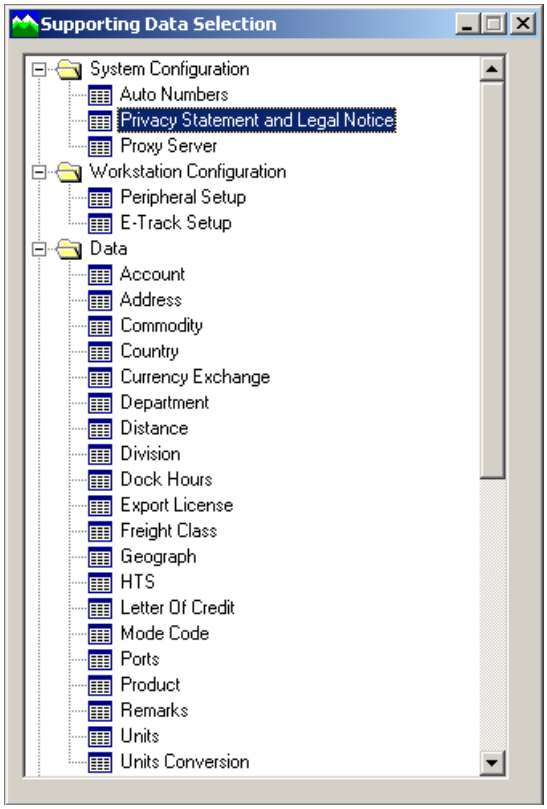
Open a Shipping screen with the **AccountSetID** field enabled and type your Account Set into the field. The Account and associated Sub-Accounts will be automatically displayed. (These cannot be changed on the Shipping Screen).



See Chapter 4 for more information on viewing Accounting Reports.

Additional Supporting Data

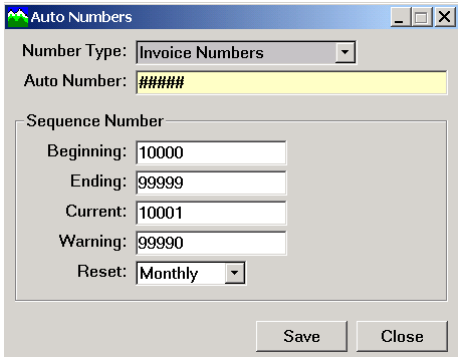
The following information covers the less frequently-used features found in the Supporting Data tables. This information is presented in the order it appears in the SendSuite Shipping Supporting Data module.



NOTE: If you specify that the user must select a valid account set, then the user must use a Shipping Screen with the **Account Set** field available. See Chapter 3 for more information on configuring Shipping Screens.

System Configuration

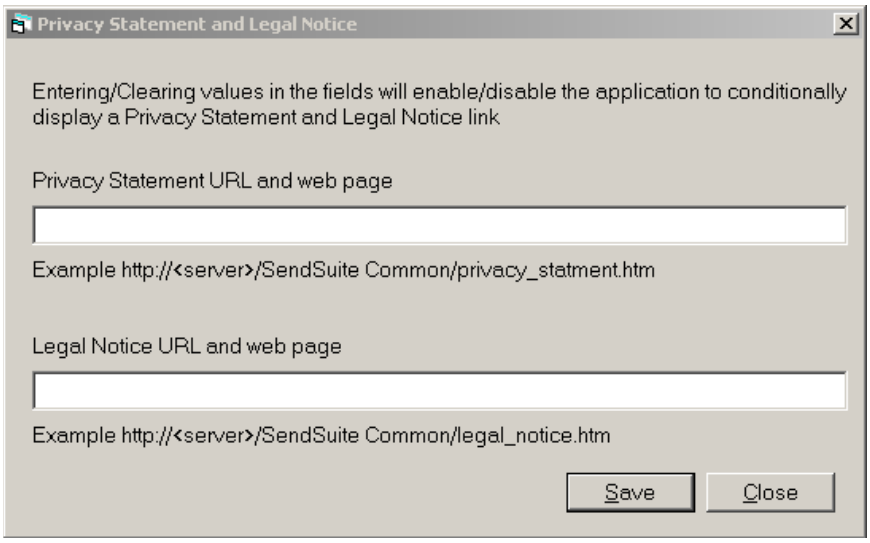
Auto Numbers



In Auto Numbers one can set the Sequence Number to increment Bill Numbers, Invoice Numbers, Order Numbers, Status Numbers, and VICSBOL Numbers. The sequence numbers can be set to use a Beginning, Ending, and Current, along with a warning and when to Reset those numbers.

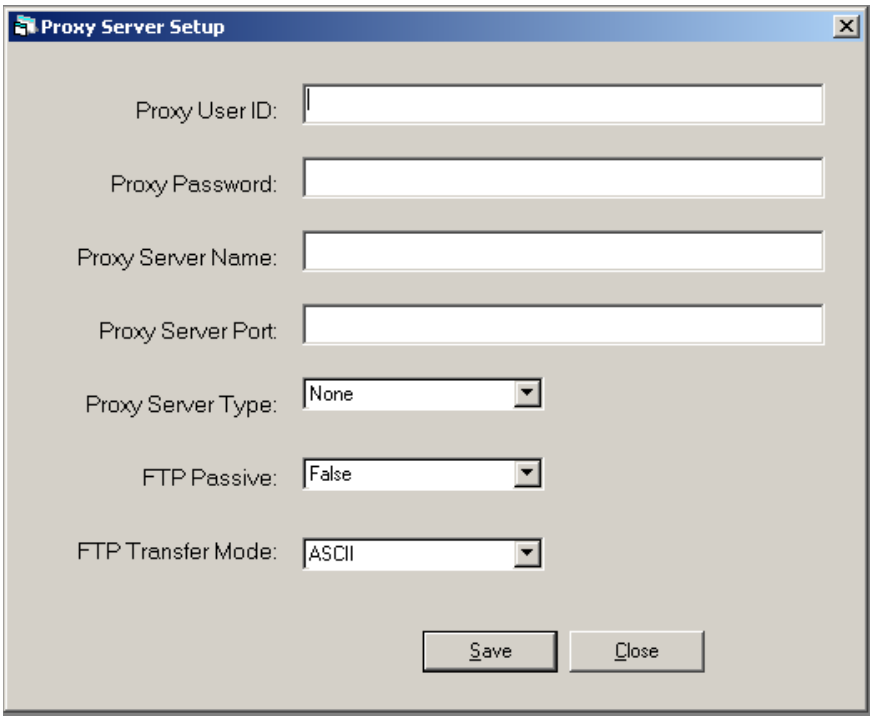
Additional Supporting Data

Privacy Statement and Legal Notice


Privacy Statement and Legal Notice
Entering/Clearing values in the fields will enable/disable the application to conditionally display a Privacy Statement and Legal Notice link
Privacy Statement URL and web page
Example http://<server>/SendSuite Common/privacy_statment.htm
Legal Notice URL and web page
Example http://<server>/SendSuite Common/legal_notice.htm
Save
Close

When values are entered into the URLs for the **Privacy Statement** or **Legal Notice** fields, the system will display links in the top right of the thin-client screen to allow the user to navigate to these pages for reference.

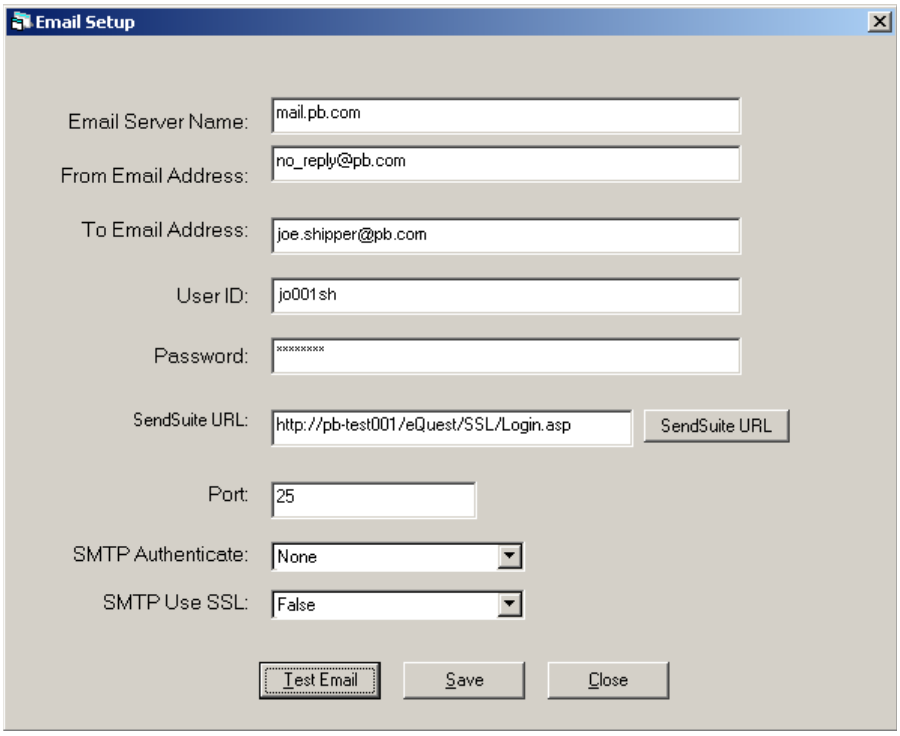
Proxy Server



Proxy Server configuration supports the use of different proxy and tunnelling methods for carrier communication such as USPS FTP.

Additional Supporting Data

Email Setup

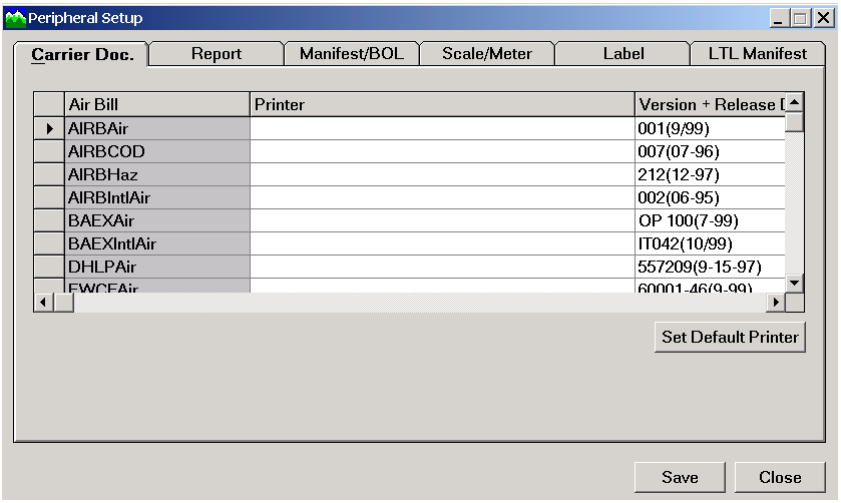


If you setup password resets for SendSuite Shipping, use the Email Setup screen to configure your email server settings. Configuration settings will vary depending on each email server's settings.

To test your email settings, enter your server settings and type an email address in the **To Email Address** field. **Click Test Email**, and an email should arrive at the address you just entered.

Workstation Configuration

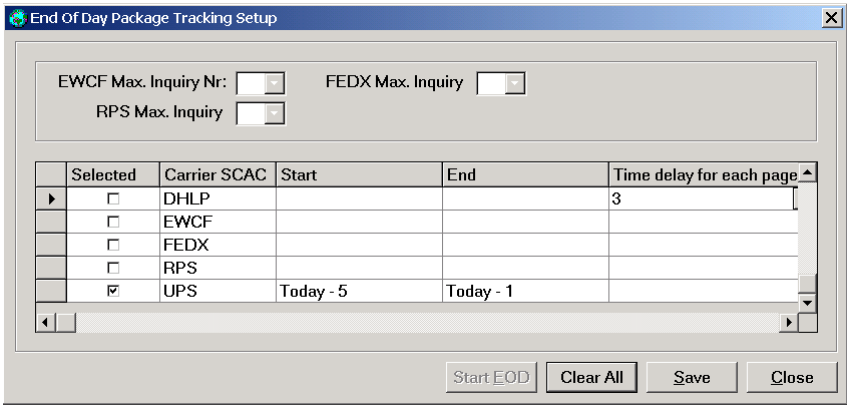
Peripheral Setup



Obsolete. Use the SendSuite Shipping Digital Dashboard to configure peripherals in SendSuite Shipping.

Additional Supporting Data

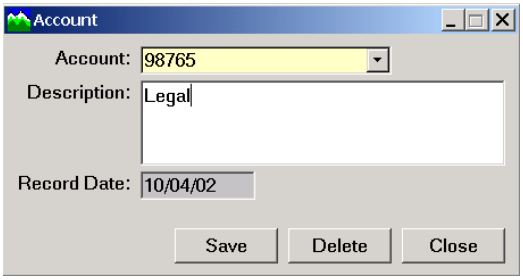
E-Track Setup



In E-Track Setup, settings can be configured for the various carriers regarding if and when SendSuite goes out and tries updating tracking information.

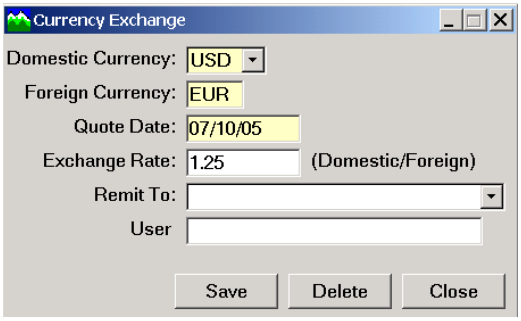
Data

Account



Use the Account Number table to set up account numbers that you can use to maintain orders and/or shipping charges. One may also obtain detailed or summary information by printing account reports. This field corresponds to the **Sub-Sub-Account** in the thin-client.

Currency Exchange

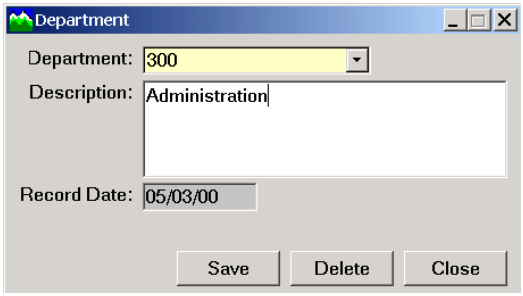


Use the Currency Exchange table to maintain foreign currency exchange rates. Currency rates are not entered for you. You will need to enter the rates and keep them up-to-date if you want them to be useful for your international documents.

Additional Supporting Data

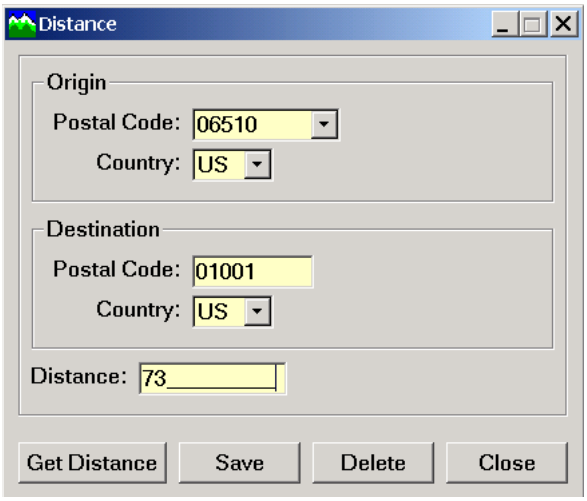
Data

Department



Use the Department table to maintain a list of your organization's departments for accounting purposes. This field corresponds to the **Sub-Account** in the thin-client.

Distance



The Distance table contains distance information for each set of origin and destination that your system has used to rate an LTL or truckload shipment.

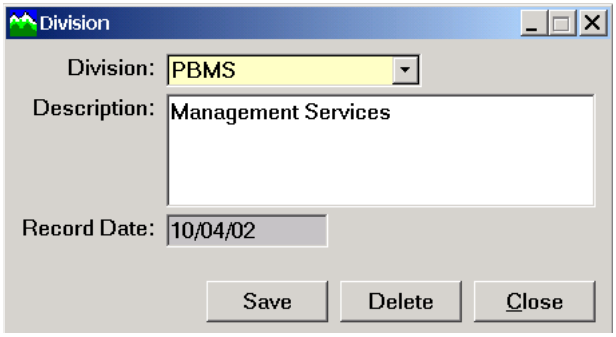
For example, after you rate a shipment going from Minneapolis to Chicago, the distance between those cities will display in the data file.

This is used for Distance Rated carriers, which requires installation of PCMiler software

Additional Supporting Data

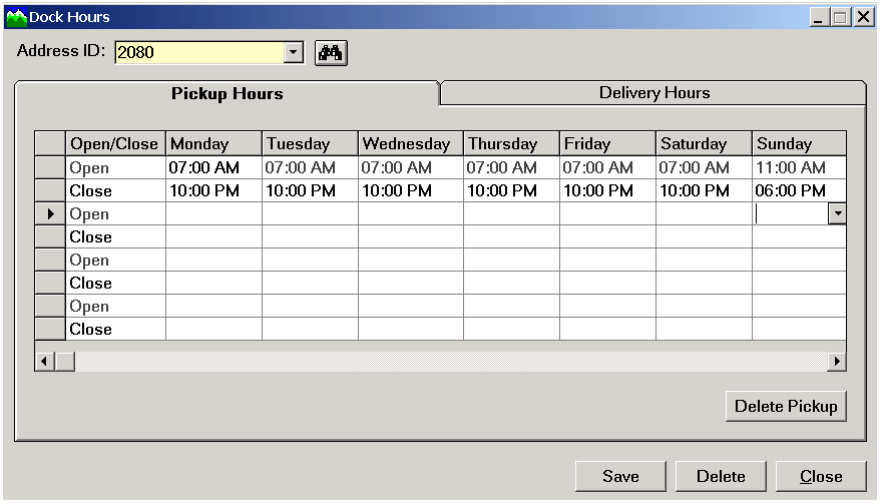
Data

Division



Use the Division table to optionally maintain a list of your organization's divisions for accounting purposes. This field corresponds to the **Account** in the thin-client.

Dock Hours

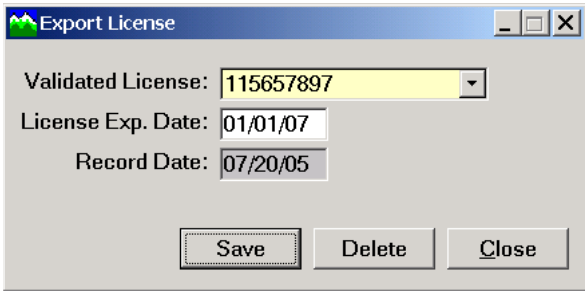


Use the Dock Hours table to maintain pickup and delivery hours of operation for each of your customers' or vendors' shipping docks. Dock hours can be included in route instruction reports.

Additional Supporting Data

Data

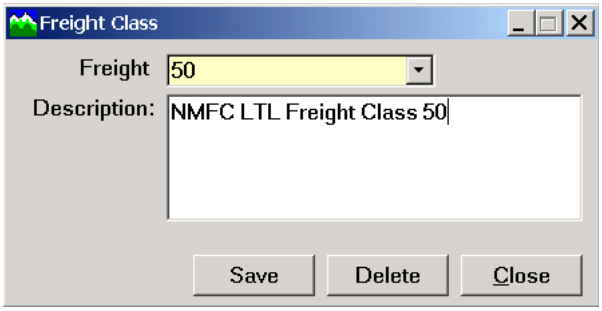
Export Licence



An export license is needed to ship certain commodities to certain countries. If your product requires a license for export, enter the export license number and expiration date. For many SendSuite overseas shippers, no license is required (NLR) for ordinary goods to friendly countries.

NOTE: Standard NMFC Freight Classes are loaded during installation and should not require modification.

Freight Class



Use the Freight Class table to maintain a list of freight classes for your products. A freight class determines the cost to ship a product by LTL or truckload carrier. Each freight class is based on a combination of factors such as the weight, risk in handling, bulk, value, competition and cost of handling.

You must have a freight class in this data file for every product that you will ship by LTL shipment. Look up each freight class in the NMFC (National Motor Freight Classification) Guide.

While the freight class value can be used for rating, you should utilize the commodity code if you want freight descriptions to print on the bill of lading.

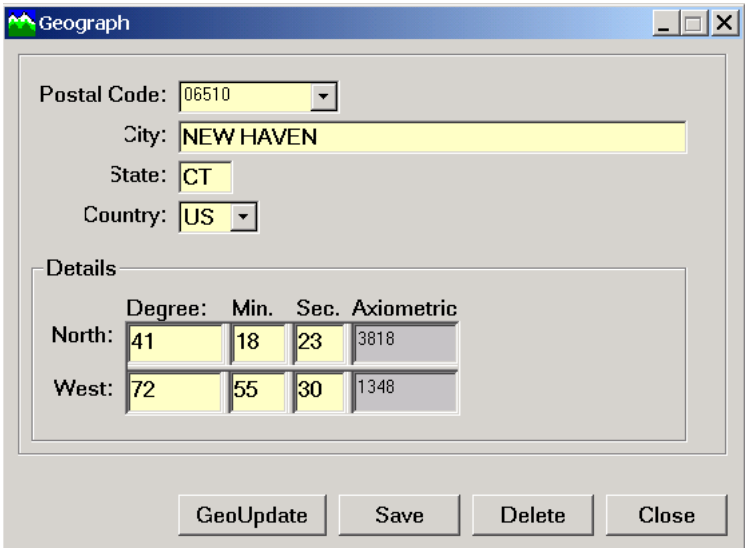
For more information, see the NMFC web page:

http://www.nmfta.org/

Additional Supporting Data

Data

Geograph



The Geograph table contains the geographic coordinates for all zip codes in the United States. Use this information to calculate distance-based rates. You can modify a set of pre-populated coordinates.

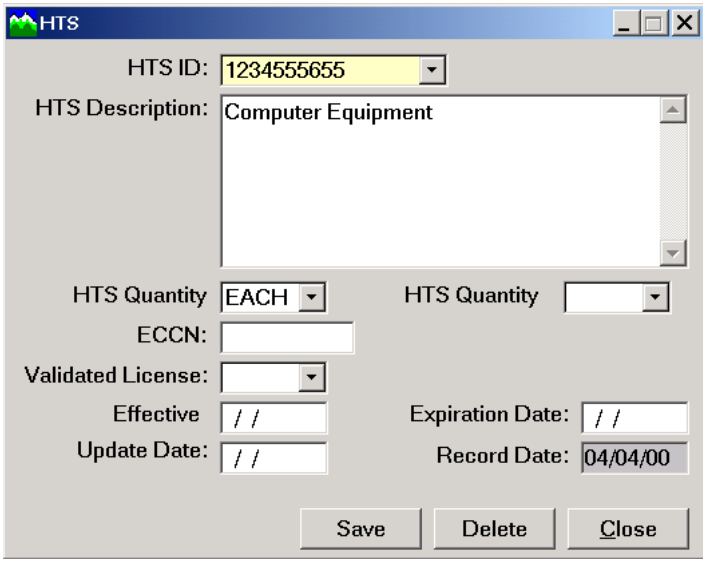
To have SendSuite calculate distances to Canada or Mexico, manually enter the postal code and coordinates on this window. Then, go to the Distance window and have SendSuite load the distance from the PC Miler data file.

Geograph Batch Update - Use this table to load updates from a Geograph Update file into your SendSuite system. Updates will periodically be provided to you.

Additional Supporting Data

Data

HTS



A harmonized code is like an international commodity code. The shipper should be familiar with their HTS codes.

All products being exported to another country must be assigned their appropriate Harmonized Tariff Schedule (HTS) number as defined by the International Standards Organization (ISO). The first six digits of the HTS number serves as a common identification for the product in all countries.

The US Census Bureau maintains statistics about the import and export of commodities between the US and other countries.

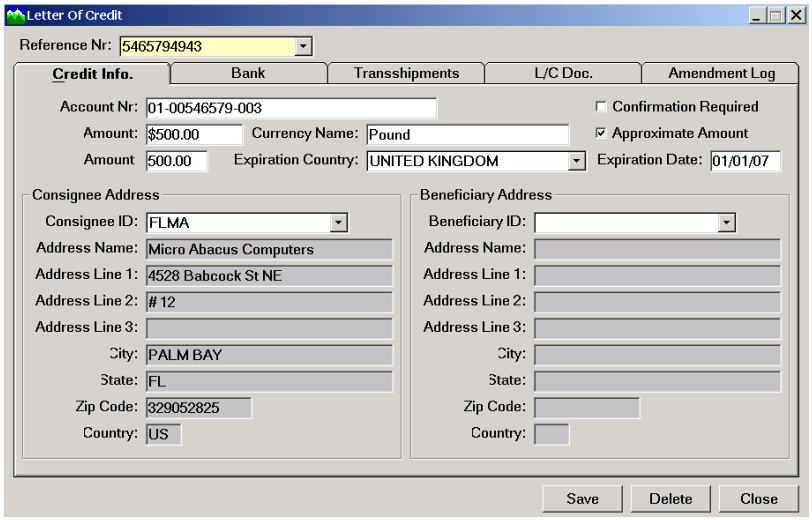
Schedule B HTS numbers can be located on the Census Bureau's web site:

http://www.census.gov/foreign-trade/schedules/b/

Additional Supporting Data

Data

Letter of Credit



Use the Letter of Credit table to store detailed information about each consignee letter of credit. A letter of credit verifies that funds will be available for goods and/or shipping costs. Each letter must be saved under a unique alpha-numeric reference number.

Mode Code



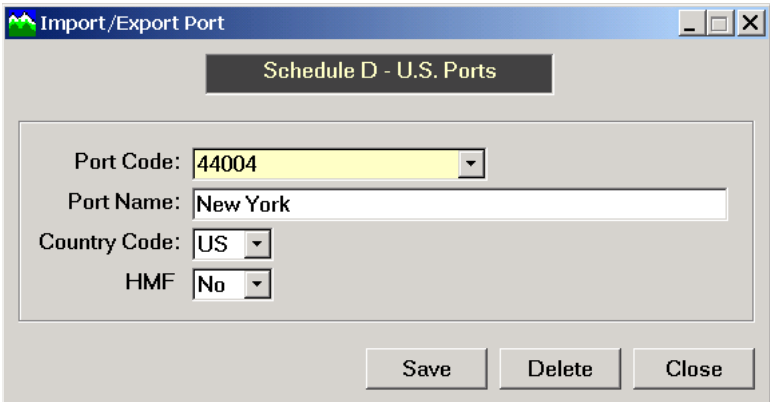
The Mode Code table stores transportation mode codes used in rating packages. A transportation mode lets you specify a group of carrier services. For example, the code “Air” indicates to select a rate for shipment by Air.

Generally, it is not necessary to modify anything in the Mode Code table.

Additional Supporting Data

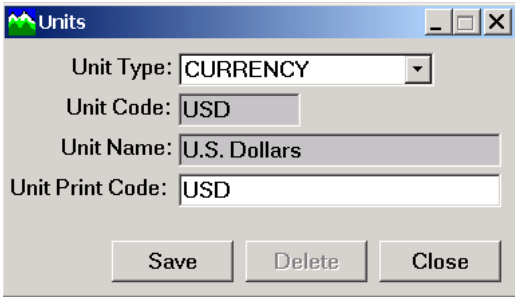
Data

Ports



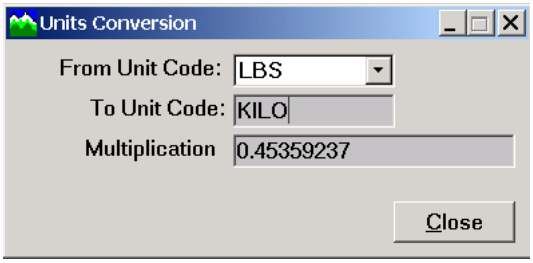
The ports of exit and entry can be entered here. This includes the Foreign Port (Schedule K) information as well as the U.S. Port (Schedule D) information.

Units



Use the Units table to look up the units of measurement used in SendSuite Shipping. This information is for viewing only, and cannot be changed.

Unit Conversion



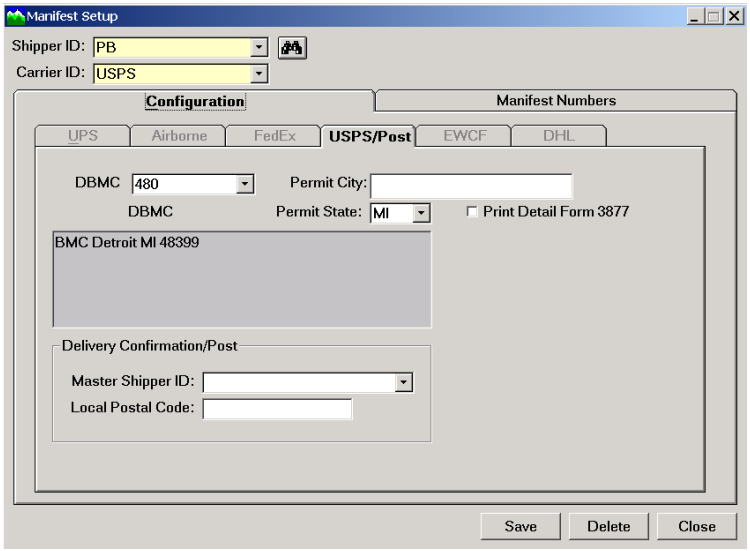
Use the Unit Conversion table to look up how units of measurement are converted to other units. This information is for viewing only, and cannot be changed.

Additional Supporting Data

Carrier & Labels

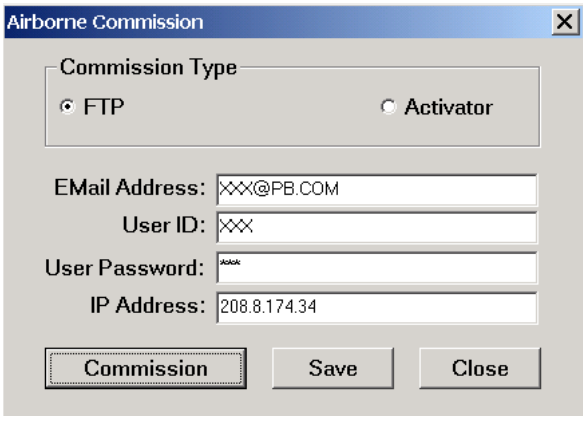
NOTE: The Manifest Setup is configured during carrier installation.

Manifest Setup



Use this feature to make required settings for carrier manifests. You can make different settings for each shipper.

Airborne Commission



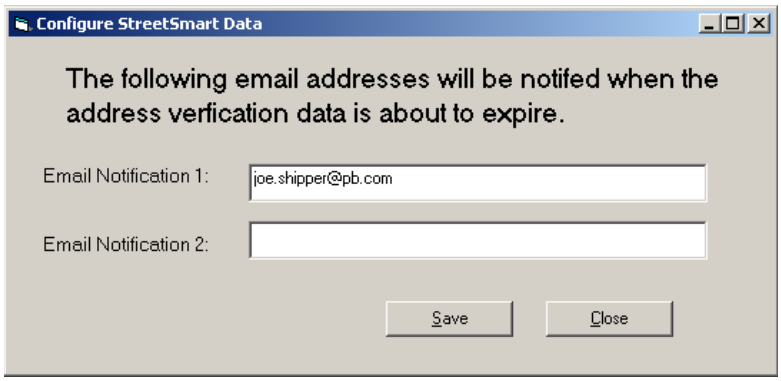
Obsolete. Airborne services have been replaced by DHL.

Additional Supporting Data

Carrier & Labels

Configure StreetSmart Data

StreetSmart Address Verification data is installed using the Address Verification install CD. See *SVTS9128* for more information. Use this screen to notify the SendSuite Shipping administrator before the Address Verification data expires.


Configure StreetSmart Data
The following email addresses will be notifed when the address verfication data is about to expire.
Email Notification 1:
joe.shipper@pb.com
Email Notification 2:
Save
Close

ONTR (OnTrac Communication)

Use this screen to set your User ID and password for OnTrac communication. See *SVTS9129* for more information.

EANC (Load EANC Rates)

Use this screen to manually download rates from Eastern Connection. See *SVTS9129* for more information.

NOTE: UPS Communication is configured during carrier installation.

UPS

UPS Communication
Use the UPS Communication to setup the desired connection method to UPS. This can be either direct Internet access or dial-up.

UPS Commission
Use UPS Commission to put the system in production, giving the system the ability to ship UPS and transmit revenue files.

UPS DDU Basic Load
This is used under special circumstances where the customer negotiates basic contract rates with UPS. Engineering is involved in creating files that are loaded by a Service Representative.

UPS DDU PO Box Load
This is used under special circumstances where the customer negotiates basic contract rates with UPS. Engineering is involved in creating files that are loaded by a Service Representative.

UPS Lane Load
This is used under special circumstances where the customer negotiates basic contract rates with UPS. Engineering is involved in creating files that are loaded by a Service Representative.

Additional Supporting Data

Carrier & Labels

UPS Support Files

UPS Support Files creates activity logs that are useful in troubleshooting connectivity and transmission issues with UPS communications.

USPS

Electronic Communication Setup

Use this screen to configure your FTP information for communicating with the USPS.

NOTE: Delivery Confirmation is configured during carrier installation.

Delivery Confirmation Setup

Use Delivery Confirmation Setup to specify the user name and password along with the upload and download paths given by USPS to transmit Delivery Confirmation Data.

Service Rate Category Setup

Use this screen to select Commercial Plus rates for USPS services, which are significantly lower than retail rates. Before using Commercial Plus rates, a shipper must meet certain USPS thresholds or have an existing agreement with the USPS.

Install RDI Data

Use this to update the RDI address data given by the post office via CD through a monthly subscription.

Rates

Tariff Setup

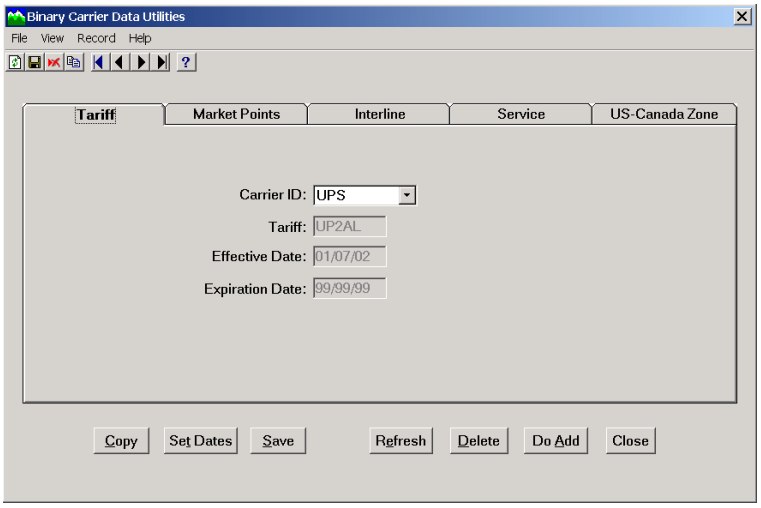
Please see Chapter 6: Tariffs for more information on tariff setup.

Carrier Setup

See Carrier Setup in Chapter 6 of this guide for more information.

NOTE: Binary Carrier Data is configured during carrier installation.

Binary Carrier Data



The Binary Carrier Data Utilities dialog box contains the following tabs: Tariff, Market Points, Interline, Service and US-Canada Zone.

Additional Supporting Data

Rates

The following fields are located on each tab:

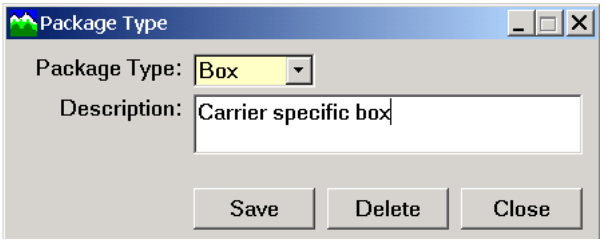
- **Carrier ID** - From the drop-down list, select the LTL Carrier whose rates and zip to zone are stored in a proprietary Binary format.
- **Tariff** - The identifier under which a set of rates are stored in SendSuite. The Tariff ID may differ from the tariff name in the Tariff field, which is defined by the carrier.
- **Effective Date** - The date that the rates for this carrier and tariff become effective.
- **Expiration Date** - The date after which the discount lane will no longer be used.

The Binary Z Tariff header information is located on the Tariff tab or US-Canada Zone tab.

The **Interline** and **Service** tabs have an additional button: **Update Points**. This allows you to modify the values previously configured in the system. This should only be done in special circumstances. Logistics Services periodically receives updates from the carriers and provides updates to the customers. Any modifications should be sent (using e-mail) to Logistics Services.

Package Type

NOTE: Commonly-used package types are loaded during installation and should not need modification.



Use this window to setup your package type codes. A package type is an identifier for a type of package used in rating. For example, if you are rating using letter rates, you may have a package type of LTR. Then, the user can select letter rates with this code.

Labels

See *Chapter 7: Labels* for more information on labels.

Label Setup

Use the Label Setup window to define the content and purpose of labels in SendSuite. Use one of the many label templates as the basis for labels. There are four configured text fields on the labels that can be modified.

Additional Supporting Data

Rates

There are four types of labels:

- Carrier Labels - Labels required by the carrier to designate the service.
- Compliance Labels - Labels required by trading partners using EDI standards. These are provided by a third-party supplier.
- Billing Labels - Labels used for consignee billing.
- Shipper (address) Labels - Labels used to indicate the origin and destination addresses. If desired, you can use a different shipper label for each shipper ID.

See *Label Configuration* in Chapter 7 for more information.

Label Selection

All of the predefined labels are selected from the Label Selection dialog box. There are four different label types that are available. Each label type (or group) has pre-defined label IDs that correspond to a carrier, consignee, trading partner, etc.

See *Selecting a Label* in Chapter 7 for more information.

Shipment Planning Setup

Rate Shop Group

See Rate Shop Groups in Chapter 2 for more information.

Routing Instructions

See Routing Instructions in Chapter 2 for more information.

Route Priority

This indicates indicate the order in which eTMS should apply routing instructions. For example, prepaid packages may use the shipper as the first priority and consignee second. However, collect shipments may use the consignee instructions first and shipper second.

- **1st Priority** - select the routing instructions you want to use first.
- **2nd Priority** - select the routing instructions you want to use if the 1st priority choice does not have any.
- **3rd to 5th Priority** - select the routing instructions you want to use if the previous choices do not have any.

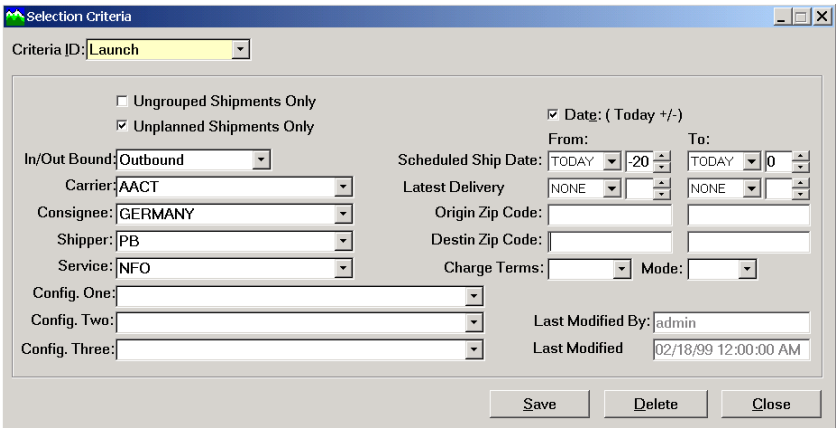
See Setting Routing Instruction Priority in Chapter 2 for more information.

Additional Supporting Data

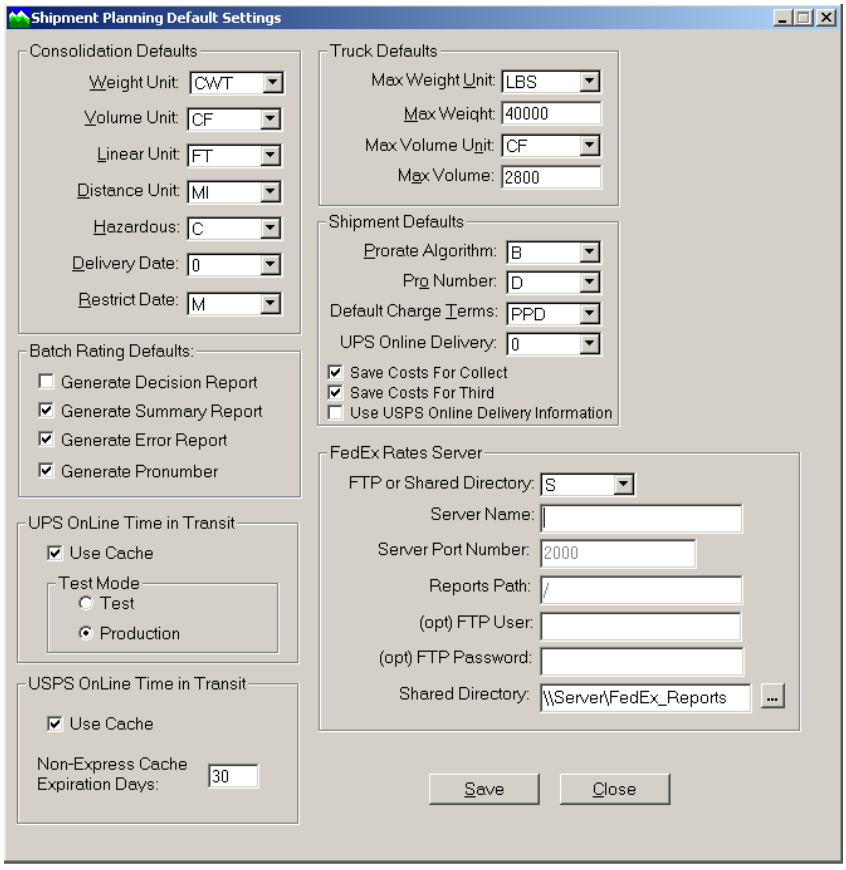
Shipment Planning Setup

Selection Criteria

Use Selection Criteria to create criteria IDs for load planning and data searches. For example, one could create a criteria ID that would search for all shipments for a consignee, for a certain carrier, within a certain date range.



Default Settings



Use Default Settings to set Shipment Planning defaults which include, Consolidation, Batch Rating, Truck, and Shipment Defaults. Also FedEx server settings are set here.

3 Shipping

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E-Track

You can use SendSuite Shipping to track shipments through the Internet. This can be done on a shipment-by-shipment basis or in a batch mode. Follow the instructions below to configure e-Track. Once configured, you can automate the e-Track functionality by configuring a task in the Task Scheduler. See *Task Scheduler* on page 5-16 for detailed instructions pertaining to automating the e-Track process.

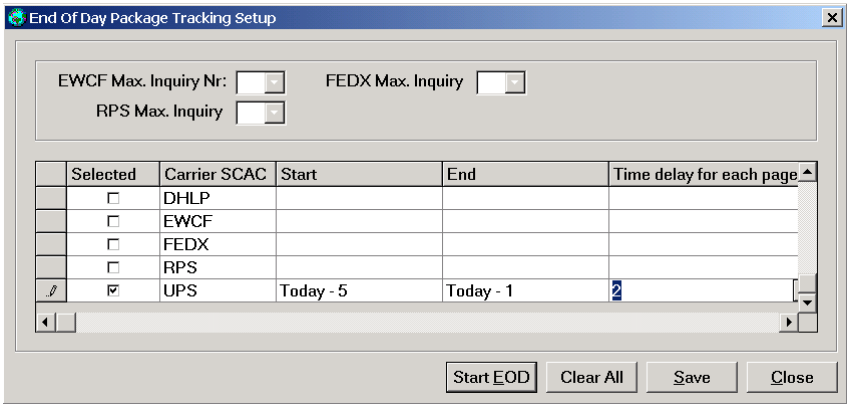
Data

When you track the delivery status of shipments using e-Track, SendSuite Shipping updates several fields. Specifically, it updates tblLoad.ActualDelDate. This field is compared to tblLoad.ScheduledDelDate when the Carrier Performance Analysis reports are run.

Tracking Shipments

To track a batch of shipments using e-Track:

1. From the SendSuite Shipping Control Center, open the **Shipping Module**.
2. Expand **Workstation Configuration** and double-click **E-Track Setup**. The End of Day Package Tracking Setup window appears.



3. Select the checkboxes in the **Selected** column for the carriers you want to track.
4. Type the Start and End dates for each of the carriers. If you specify actual dates, the format must be MM/DD/YYYY.

> **NOTE:** You can specify a range of actual dates (for example, 03/01/2005 through 03/14/2006) or you can specify a range of dates that is relative to today's date (for example, TODAY-15 through TODAY-1). The advantage of using the range of dates that is relative to today's date is that you don't have to update the dates each time you run a batch e-Track. The word TODAY must be in all caps.

E-Track

Tracking Shipments

NOTE: Within the carrier group, if one of the shipment inquiries fails, then the whole group fails. For example, if you selected 10 as the maximum inquiry number for FEDX, if one inquiry failed, the other 9 would fail as well. This is the result of carrier limitations.

5. Click inside the **Time Delay for Each Page** field that corresponds with one of the selected carriers. A drop-down arrow appears allowing you to select a delay of 1 to 15 seconds. This setting is used to create a delay between each tracking request sent to the specified carrier.
6. If you are going to track FEDX (Federal Express), EWCF (Emery), or RPS shipments (Federal Express Ground Shipments), you must also specify the maximum number of inquiries that SendSuite Shipping will send to the carriers' websites. You must specify this number because the carriers allow multiple inquiries to the web sites at one time.
7. Click the **Save** button.
8. To launch the batch e-Track process, click the **Start EOD** button.

International Documents

Overview

SendSuite Shipping will print export documentation from the shipping workstation. No configuration is required on the Administrative Workstation, but this document describes what data is used to produce the documents.

SendSuite Shipping can print four international documents:

- Commercial Invoice
- Shipper's Export Declaration (SED)
- Certificate of Origin
- NAFTA Certificate

The documents require product details. You can load much of this information in tblProduct. Those products can then be selected during shipping. See *Product Data* in Chapter 2.

These documents may require more information than will fit on a standard shipping screen. You may want to consider creating a separate screen for the entry of international shipping information. See *Shipping Screens* in Chapter 3. When a shipment is processed, SendSuite Shipping uses fields from tblIntlLine to complete some of the documentation. You can map data to this table using the SendSuite Shipping Data Mapper, but you cannot map to this table using ODBC or XML. For more information on mapping data, see *Mapping to tblIntlLine* in Chapter 8.

When the documents are printed from the shipping screen, the default number of copies is 1. To set a different default number, change the properties for each country on tblCountry. See *Country Data* in Chapter 2.

International Documents

Overview

Using these Instructions

The pages that follow show a sample of each document. Each sample document is meant to show where data appears; they are not intended as an example of the type of data you should enter in a given field.

After each sample document is a table. Each table lists the report fields and where SendSuite Shipping gets the data for each field. You will see shorthand references to some tables:

- SH = tblShipmentHeader
- L = tblLoad
- IL = tblIntlLine

Single values

Some document fields draw from several database fields, checking each one until it finds a value. For example, you might see the following:

Document Field	SendSuite Shipping Source	Notes
3. Transportation Reference No	SH.BookingNr L.MasterTrackingNr L.ProNumber SH.PreSpecProNumber	Selects one

In this example, SendSuite Shipping will look at the fields in descending order and it uses the first value it finds. For example, consider a shipment with the following values:

SendSuite Shipping Source	Value	Document Field
SH.BookingNr	NULL	12345
L.MasterTrackingNr	NULL	
L.ProNumber	12345	
SH.PreSpecProNumber	45678	

The document will show the third value because it was the first field with a value. The last database field is ignored.

International Documents

Overview

Multiple Values

Some document fields draw from several database fields, using the values from each field. For example, you might see the following:

Document Field	SendSuite Shipping Source	Notes
Order NR & Items NR Reference NR	IL.OrderNr IL.OrderHostItemNr IL.PONr	Combined field

In this example, the values from all the fields will appear on the document.

Calculated Values

Some document fields draw from several database fields, adding or multiplying the values together. For example, you might see the following:

Document Field	SendSuite Shipping Source	Notes
Pricing Total	(IL.PricingUnit * IL.ProductQuantity)	

In this example, the values from the two database fields are multiplied, and their product appears on the document. For example, if the Pricing Unit is $5.00 each, and there is a Product Quantity of 2, then there would be a value of $10.00 on the document.

Some document fields summarize database information. For example, you might see the following:

Document Field	SendSuite Shipping Source	Notes
Total Quantity	Sum(IL.ProductQuantity)	This is the sum of all the lines.

In this example, there are multiple lines, so the system adds the values together. There are other fields where the system counts the number of lines.

Multiple Lines

The documents draw information from line items, so several lines of information will appear on the page. When you see **for each**, it means that the system is drawing information for each individual line on the table.

International Documents

Commercial Invoice



COMMERCIAL INVOICE

Invoice Number: 10058
Invoice Date: 23 Sep 2002
Trade Terms: CFR
Payment Terms: Net 30

Charge Terms: PPD Page 1 of 1

SHIP TO
French Destination
123 Rue
Paris RF4 6
FR FRANCE
Attn\Phone: attn (pho) neF-ranc

SOLD TO
Sold To Name
101 Sold to Dr
MINNEAPOLIS, MN 55406
Attn\Phone: Sold To Attn (612) 885-4000

VENDOR
Pitney Bowes Shipping
10800 Lyndal Avenue South
MINNEAPOLIS, MN 55420

SHIP FROM
Pitney Bowes Shipping
10800 Lyndal Avenue South
MINNEAPOLIS, MN
US UNITED STATES
Attn\Phone: (952) 885-7100

REMIT TO
Remit to address name
123 Financial
BEVERLY HILLS, CA 90210
US UNITED STATES
Attn\Phone: (213) 555-1212

Reference Number:	Carrier Name:	Service:	Port of Export:
ref nr	United Parcel Service	IEC	
Total Pieces:	**Total Net Weight:**	**Total Gross Weight:**	**Total Volume:**
1	141.0 LBS (63.96 KILOS)	5.0 LBS (2.27 KILOS)	0.0 CF 0.0 M3
Total Quantity:	**Pro Number:**	**Country of TransShipment:**	**Department Ruling:**
60	1Z1234566700045915		

Remarks: exportremarks

QUANTITY	UNIT MEAS	PRODUCT NUMBER / DESCRIPTION	HTS NR	CTR MFG	ORDER NR & ITEM NR REFERENCE NR	PRICING UNIT	PRICING TOTAL
10.00	EACH	Intl102 International Product Description number 2	3806.10	JP	Order2 2 po2 2	400	4,000.00
50.00	EACH	Intl101 International Product Descriptio	3806.10	MX	orderNo 1 PONr1324	595	29,750.00

It is hereby certified that this invoice shows the actual price of the goods described, that no other invoice has been or will be issued and that all particulars are true and correct.

These commodities, technology or software were exported from the United States in accordance with the Export Administration Regulations. Diversion contrary to U.S. Law is prohibited.

Authorized Signature: _____

Payable In USD

Total Product	33,750.00
Packing	10.00
Freight	20.00
Other	30.00
Insurance	40.00
Discount/Rebate	50.00
	60.00
	70.00
	80.00
	34,110.00

©[] PB TMS
All Rights Reserved

International Documents

Commercial Invoice

Document Field	SendSuite Shipping Source	Notes
Invoice Number	SH.BillNr	
Invoice Date	L.ScheduledShipDate SH.ScheduledShipDate	Selects one
Trade Terms	SH.TradeTerms	
Payment Terms	SH.PaymentTerms	
Charge Terms	L.ChargeTerms SH.ChargeTerms	Selects one
Ship To name, address, etc.	vUltimateCons vAgent	Selects one. If no selection is made in SH. UltimateConsID, then the system populates vUltimateCons with information from vConsignee
Sold To name, address, etc.	vSoldTo	
Vendor name, address, etc.	vExportAlternateShipper	If no selection is made in SH. AltShipperID, then the system populates vExportAlternateShipper with information from vShipper
Ship From name, address etc.	vShipper	
Remit To name address, etc.	vRemitTo	
Reference Number	SH.RefNr	
Carrier Name	vCarrier.Name	
Service	L.Service SH.PreSpecService	Selects one
Port of Export	SH.PortOfExportName	For shipments to Canada only
Total Pieces	SH.TotalShipPieces	
Total Net Weight	Sum(IL.NetWeight * IL.ProductQuantity)	This is the sum of all the lines.
Total Gross Weight	SH.TotalActualWeight	
Total Volume	SH.TotalVolume	
Total Quantity	Sum(IL.ProductQuantity)	This is the sum of all the lines.

International Documents

Commercial Invoice

Document Field	SendSuite Shipping Source	Notes
Pro Number	L.MasterTrackingNr L.ProNr SH.PreSpecProNumber	If this is a multipiece shipment, then the system looks at MasterTrackingNr. Otherwise, it selects one of the others.
Country of TransShipment	SH.CountryOfTranshipment	For shipments to Canada only
Department Ruling	SH.DeptRuling	For shipments to Canada only
Remarks	SH.ExportRemarks	
Quantity	Sum(IL.ProductQuantity)	If this is a multipiece shipment, then the system will sum the total number of product items across all packages
Unit Meas	IL.PricingUnit	
Product Number / Description	IL.ProductNr IL.ProductDescription	Prints both
HTS NR	IL.HTSNr	The HTS number is a 10 digit number. SendSuite Shipping prints only the first six digits as required on the Commercial Invoice.
CTR MFG	IL.CountryMFG	
Order NR & Items NR Reference NR	IL.OrderNr IL.OrderHostItemNr IL.PONr	Prints all
Pricing Unit	IL.PricingUnit	
Pricing Total	((IL.PricingUnit * Sum(IL. ProductQuantity))	If this is a multipiece shipment, then the system will sum the total number of product items across all packages

International Documents

Commercial Invoice

Document Field	SendSuite Shipping Source	Notes
Packing Freight Other Insurance Discount/Rebate	SH.MiscChargeAmtOne SH.MiscChargeAmtTwo SH.MiscChargeAmtThree SH.MiscChargeAmtFour SH.MiscChargeAmtFive	The labels on the report come from the corresponding SH.MiscChargeDesc field. To change these labels, the miscellaneous charge description fields must be on the shipping screen so the user can change them.
	SH.MiscChargeAmtSix SH.MiscChargeAmtSeven SH.MiscChargeAmtEight	There are three more miscellaneous charge amount fields you can place on the shipping screen. To have the labels show up on the document, the user must enter those names on the shipping screen in a MiscChargeDesc field.

International Documents

Certificate of Origin

CERTIFICATE OF ORIGIN

Page: 1 of 1

2. EXPORTER (Principal or seller-licensee and address including ZIP Code) Pitney Bowes Shipping 10800 Lyndal Avenue South MINNEAPOLIS, MN US UNITED STATES ZIP CODE 55420	5. DOCUMENT NUMBER 5A. B/L OR AWB NUMBER 1Z1234566700045915 6. EXPORTER REFERENCE 10058 ref nr
3. CONSIGNED TO French Destination 123 Rue Paris RF4 6 FR FRANCE	7. FORWARDING AGENT (Name and address - references) Agent Name 101 Agent Dr MINNEAPOLIS, MN 55420 8. POINT (STATE) OF ORIGIN OR FTZ NUMBER MN
4. NOTIFY PARTY/INTERMEDIATE CONSIGNEE (Name and address) Intermediate Cons Name 101 Intermediate way SAINT PAUL, MN 55101 US UNITED STATES	9. DOMESTIC ROUTING/EXPORT INSTRUCTIONS
12. PRE-CARRIAGE BY United Parcel Service 13. PLACE OF RECEIPT BY PRE-CARRIER MINNEAPOLIS	
14. EXPORTING CARRIER United Parcel Service 15. PORT OF LOADING/EXPORT port of export	10. LOADING PIER/TERMINAL load pier
16. FOREIGN PORT OF UNLOADING(Vessel and air only) port of unloading FRANCE 17. PLACE OF DELIVERY BY ON-CARRIER Paris FRANCE	11. TYPE OF MOVE IEC 11a. CONTAINERIZED (Vessel only) ☐ Yes ☒ No

MARKS AND NUMBERS (18)	NUMBER OF PACKAGES (19)	DESCRIPTION OF COMMODITIES (In Schedule B detail) (20)	GROSS WEIGHT (Kilos) (21)
1Z1234566700045915 (Package 1)	1	3806100050	2
1Z1234566700045915 (Package 1)	1	3806100050	2

The undersigned (Owner or Agent), does hereby declare for the above named shipper, the goods as described above were shipped on the above date and consigned as indicated and are products of MX. Dated at MINNEAPOLIS on 9/23/2002. Sworn to before me this on 9/23/2002.

SIGNATURE OF OWNER OR AGENT

The MINNEAPOLIS Chamber of Commerce, a recognized Chamber of Commerce under the laws of the State of MN, has examined the manufacturer's invoice or shipper's affidavit concerning the origin of the merchandise, and, according to the best of its knowledge and belief, finds that the products named originated in MX.

Secretary _____

International Documents

Certificate of Origin

Document Field	SendSuite Shipping Source	Notes
2. Exporter	vShipper	
3. Consigned To	vUltimateCons VAgent	Selects one. If no selection is made in SH. UltimateConsID, then the system populates vUltimateCons with information from vConsignee
4. Notify Party / Intermediate Consignee	vIntermediate	
5. Document Number	SH.BookingNr	
5A. B/L or AWB Number	L.MasterTrackingNr L.ProNr SH.PreSpecProNumber	If this is a multipiece shipment, then the system looks at MasterTrackingNr. Otherwise, it selects one of the others.
6. Exporter Reference	SH.BillNr SH.RefNr	Prints both
7. Forwarding Agent	vAgent	
8. Point of Origin or FTZ Number	vShipper.ShipperState SH.FTZNr	Selects one
9. Domestic Routing/Export INstructions	SHRemarks.BOLRemarks	
10. Loading Pier/ Terminal	SH.LoadingPier	
11. Type of Move	L.Service SH.PreSpecService	Selects one
11a. Containerized	Yes if SH.TotalContainerCount>1 Otherwise, checks No	
12. Pre-Carriage by	vCarrier.Name	
13. Place of Receipt by Pre-Carrier	vShipper.ShipperCity	

International Documents

Certificate of Origin

Document Field	SendSuite Shipping Source	Notes
14. Exporting Carrier	If L.Service or SH.PreSpecService = OCN, then uses SH.VesselVoyageNr Otherwise, uses vCarrier. Name	
15. Port of Loading/ Export	SH.PortOfExportName	
16. Foreign Port of Unloading	SH.PortOfUnloadingName	
17. Place of Delivery by On-Carrier	vUltimateCons.ConsCity tblCountry.CountryName	Prints both.
18. Marks and Numbers	L.ProNumber IL.PackageType IL.PackageID	Prints all in the following format: ProNumber (PackageType, PackageID) The lines are rolled up by IL.HTSNr and IL.CountryMfg.
19. Number of Packages	Sum(IL)	The system counts the number of packages and places the total number in this field.
20. Description of Commodities	IL.HTSDescription	
21. Gross Weight	Sum(IL.GrossWeight)	Only one weight will show per package. For example, if you have two products in one box, one of the lines will show a zero (0) weight.

International Documents

NAFTA Certificate of Origin

DEPARTMENT OF THE TREASURY
UNITED STATES CUSTOMS SERVICE

OMB No. 1515-0204
See back of form for Paperwork Reduction Act Notice.

NORTH AMERICAN FREE TRADE AGREEMENT

Certificate of Origin

19 CFR 181.11, 181.22

1. EXPORTER NAME AND ADDRESS	2. BLANKET PERIOD (DD/MM/YY)
Pitney Bowes Shipping 10800 Lyndal Avenue South MINNEAPOLIS, MN US UNITED STATES TAX IDENTIFICATION NUMBER: 555221111	31 Dec 2001 FROM 31 Dec 2002 TO
3. PRODUCER NAME AND ADDRESS	4. IMPORTER NAME AND ADDRESS
Same TAX IDENTIFICATION NUMBER:	Sold To Name 101 Sold to Dr MINNEAPOLIS, MN 55406 US UNITED STATES TAX IDENTIFICATION NUMBER: 888337777

5. DESCRIPTION OF GOOD(S)	6. HS TARIFF CLASSIFICATION NUMBER	7. PREFERENCE CRITERION	8. PRODUCER	9. NET COST	10. COUNTRY OF ORIGIN
Bill Nr: 10058					
Intl101 International Product Descriptio	3806.10	A	NO(1)	NC	MX
Intl102 International Product Description number 2	3806.10	B	NO(2)	NC	JP

I Certify That:

- THE INFORMATION ON THIS DOCUMENT IS TRUE AND ACCURATE AND I ASSUME THE RESPONSIBILITY FOR PROVING SUCH REPRESENTATIONS. I UNDERSTAND THAT I AM LIABLE FOR ANY FALSE STATEMENTS FOR MATERIAL OMISSION MADE ON OR IN CONNECTION WITH THIS DOCUMENT;

- I AGREE TO MAINTAIN, AND PRESENT UPON REQUEST, DOCUMENTATION NECESSARY TO SUPPORT THIS CERTIFICATE, AND TO INFORM, IN WRITING, ALL PERSONS TO WHOM THE CERTIFICATE WAS GIVEN OF ANY CHANGES THAT WOULD AFFECT THE ACCURACY OR VALIDITY OF THIS CERTIFICATE;

- THE GOODS ORIGINATED IN THE TERRITORY OF ONE OR MORE OF THE PARTIES, AND COMPLY WITH THE ORIGIN REQUIREMENTS SPECIFIED FOR THOSE GOODS IN THE NORTH AMERICAN FREE TRADE AGREEMENT, AND UNLESS SPECIFICALLY EXEMPTED IN ARTICLE 411 OR ANNEX 401, THERE HAS BEEN NO FURTHER PRODUCTION OR ANY OTHER OPERATION OUTSIDE THE TERRITORIES OF THE PARTIES; AND

- THIS CERTIFICATE CONSISTS OF 1 PAGES, INCLUDING ALL ATTACHMENTS.

11.	11a. Authorized Signature		11b. COMPANY: Pitney Bowes Shipping	
	11c. Name (Print or Type)		11d. Title:	
	11e. Date: DD/MM/YY 09/23/2002	11f. Telephone Number >	(Voice) (952) 885-7100	(Facsimile)

Customs Form 434 (040397)

International Documents

NAFTA Certificate of Origin

Document Field	SendSuite Shipping Source	Notes
1. Exporter	vExportAlternateShipper	If no selection is made in SH. AltShipperID, then the system populates vExportAlternateShipper with information from vShipper
2. Blanket Period	SH.NAFTAEffectiveDate SH.NAFTAExpirationDate	Prints both. These dates are necessary only when you are printing one certificate that will cover all shipments during the blanket period.
3. Producer	SH.IntlMfgType vManufacturer	If no selection is made in SH. ManufacturerID, then the system prints “Same” on the document
4. Importer	vSoldTo vUltimateCons vAgent	Selects one. If no selection is made in SH. UltimateConsID, then the system populates vUltimateCons with information from vConsignee
5. Description of Goods	SH.BillNr IL.ProductNr IL.ProductDescription	Prints all
6. HR Tariff Classification Number	IL.HTSNr	The HTS number is a 10 digit number. SendSuite Shipping prints only the first six digits as required on the Certificate of Origin.
7. Preference Criteria	IL.NAFTAPrefCrit	
8. Producer	IL.NAFTALevel	
9. Net Cost	IL.NAFTANetCost IL.NAFTANetBeginDate IL.NAFTANetEndDate	Prints all
10. Country of Origin	IL.CountryMfg	

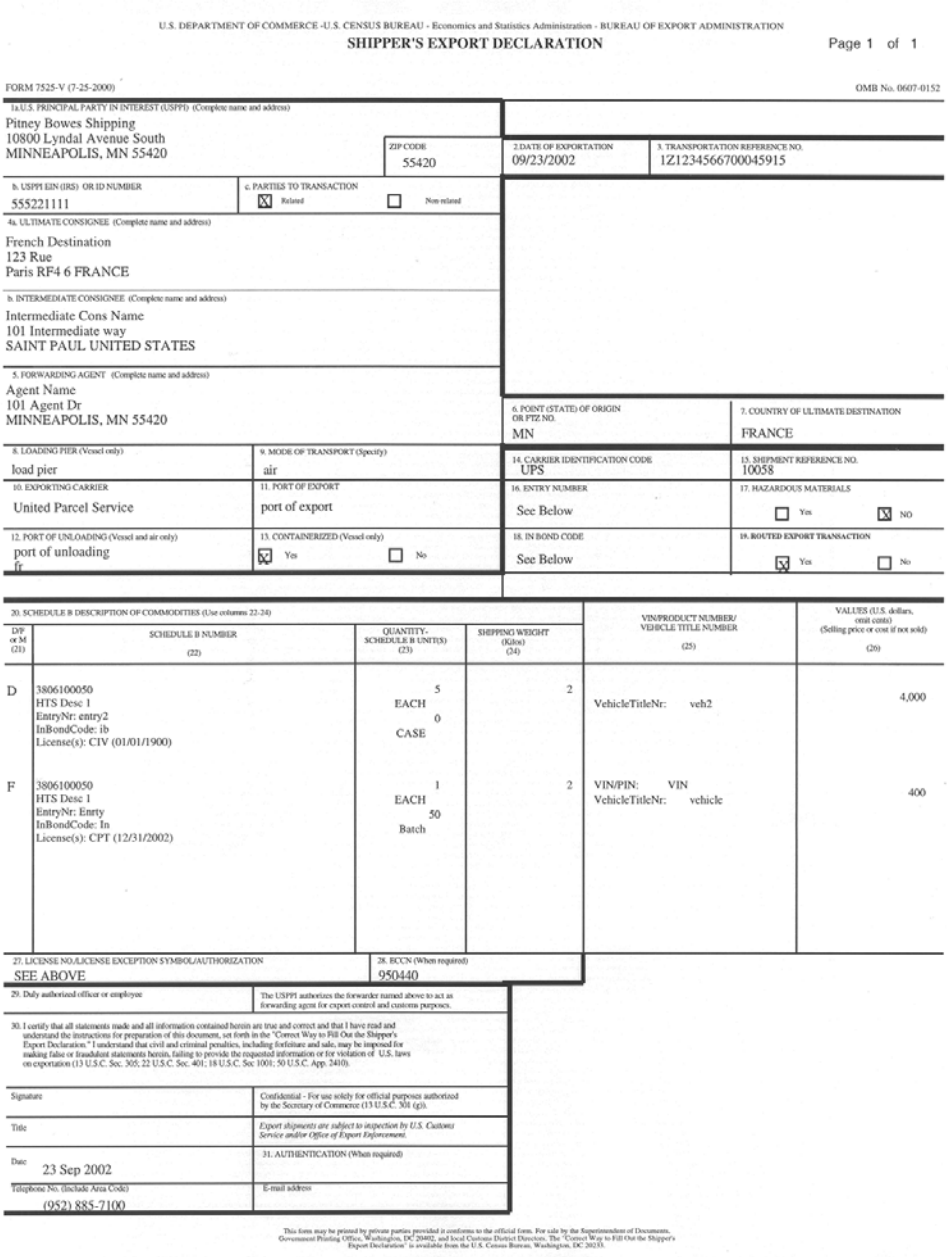
International Documents

NAFTA Certificate of Origin

Document Field	SendSuite Shipping Source	Notes
11a. Authorized Signature	none, manually written	
11b. Company Name	vShipper.ShipperName	
11c. Name	vShipper.ShipperAttention	
11d. Title	vShipper. ShipperAttentionTitle	
11e. Date	L.ScheduledShipDate SH.ScheduledShipDate SH.ActualShipDate	Selects one
11f. Telephone Number	vShipper.ShipperPhoneNr vShipper.ShipperFAXNr	Prints both

International Documents

SED



U.S. DEPARTMENT OF COMMERCE -U.S. CENSUS BUREAU - Economics and Statistics Administration - BUREAU OF EXPORT ADMINISTRATION

SHIPPER'S EXPORT DECLARATION

Page 1 of 1

FORM 7525-V (7-25-2000) OMB No. 0607-0152

1a.U.S. PRINCIPAL PARTY IN INTEREST (USPPI) (Complete name and address)
Pitney Bowes Shipping
10800 Lyndal Avenue South
MINNEAPOLIS, MN 55420

ZIP CODE: 55420

2.DATE OF EXPORTATION: 09/23/2002

3. TRANSPORTATION REFERENCE NO.: 1Z1234566700045915

b. USPPI EIN (IRS) OR ID NUMBER: 555221111

c. PARTIES TO TRANSACTION: [X] Related [ ] Non-related

4a. ULTIMATE CONSIGNEE (Complete name and address)
French Destination
123 Rue
Paris RF4 6 FRANCE

b. INTERMEDIATE CONSIGNEE (Complete name and address)
Intermediate Cons Name
101 Intermediate way
SAINT PAUL UNITED STATES

5. FORWARDING AGENT (Complete name and address)
Agent Name
101 Agent Dr
MINNEAPOLIS, MN 55420

6. POINT (STATE) OF ORIGIN OR FTZ NO.: MN

7. COUNTRY OF ULTIMATE DESTINATION: FRANCE

8. LOADING PIER (Vessel only): load pier

9. MODE OF TRANSPORT (Specify): air

14. CARRIER IDENTIFICATION CODE: UPS

15. SHIPMENT REFERENCE NO.: 10058

10. EXPORTING CARRIER: United Parcel Service

11. PORT OF EXPORT: port of export

16. ENTRY NUMBER: See Below

17. HAZARDOUS MATERIALS: [ ] Yes [X] NO

12. PORT OF UNLOADING (Vessel and air only): port of unloading fr

13. CONTAINERIZED (Vessel only): [X] Yes [ ] No

18. IN BOND CODE: See Below

19. ROUTED EXPORT TRANSACTION: [X] Yes [ ] No

20. SCHEDULE B DESCRIPTION OF COMMODITIES (Use columns 22-24)

D/F or M (21)	SCHEDULE B NUMBER (22)	QUANTITY-SCHEDULE B UNIT(S) (23)	SHIPPING WEIGHT (Kilos) (24)	VIN/PRODUCT NUMBER/ VEHICLE TITLE NUMBER (25)	VALUES (U.S. dollars, omit cents) (Selling price or cost if not sold) (26)
D	3806100050 HTS Desc 1 EntryNr: entry2 InBondCode: ib License(s): CIV (01/01/1900)	5 EACH 0 CASE	2	VehicleTitleNr: veh2	4,000
F	3806100050 HTS Desc 1 EntryNr: Enrty InBondCode: In License(s): CPT (12/31/2002)	1 EACH 50 Batch	2	VIN/PIN: VIN VehicleTitleNr: vehicle	400

27. LICENSE NO./LICENSE EXCEPTION SYMBOL/AUTHORIZATION: SEE ABOVE

28. ECCN (When required): 950440

29. Duly authorized officer or employee

The USPPI authorizes the forwarder named above to act as forwarding agent for export control and customs purposes.

30. I certify that all statements made and all information contained herein are true and correct and that I have read and understand the instructions for preparation of this document, set forth in the "Correct Way to Fill Out the Shipper's Export Declaration." I understand that civil and criminal penalties, including forfeiture and sale, may be imposed for making false or fraudulent statements herein, failing to provide the requested information or for violation of U.S. laws on exportation (13 U.S.C. Sec. 305; 22 U.S.C. Sec. 401; 18 U.S.C. Sec 1001; 50 U.S.C. App. 2410).

Signature

Confidential - For use solely for official purposes authorized by the Secretary of Commerce (13 U.S.C. 301 (g)).

Title

Export shipments are subject to inspection by U.S. Customs Service and/or Office of Export Enforcement.

Date: 23 Sep 2002

31. AUTHENTICATION (When required)

Telephone No. (Include Area Code): (952) 885-7100

E-mail address

This form may be printed by private parties provided it conforms to the official form. For sale by the Superintendent of Documents, Government Printing Office, Washington, DC 20402, and local Customs District Directors. The "Correct Way to Fill Out the Shipper's Export Declaration" is available from the U.S. Census Bureau, Washington, DC 20233.

International Documents

SED

Document Field	SendSuite Shipping Source	Notes
1a. Principle Party	vShipper	
1b. USPPI EIN (IRS) or ID Number	vShipper.ShipperIRSNR	
1c. Parties to Transaction	SH.ShipperConsRelated	
2. Date of Exportation	SH.ScheduledShipDate SH.ActualShipDate	Selects one
3. Transportation Reference No	SH.BookingNr L.MasterTrackingNr L.ProNumber SH.PreSpecProNumber	Selects one
4a. Ultimate Consignee	vUltimateCons	If no selection is made in SH. UltimateConsID, then the system populates vUltimateCons with information from vConsignee
4b. Intermediate Consignee	vIntermediate	
5. Forwarding Agent	vAgent	
6. Point (state) of Origin or FTZ No	vShipper.ShipperState SH.FtzNr	Selects one
7. Country of Ultimate Destination	vUltimateCons. ConsCountryName	If no selection is made in SH. UltimateConsID, then the system populates vUltimateCons with information from vConsignee
8. Loading Pier	SH.LoadingPier	
9. Mode of Transport	L.Service SH.PreSpecService	Selects one, then converts the value to Air, OCN, etc.
10. Exporting Carrier	SH.VesselVoyageNr vCarrier.Name	If the mode of transport has an OCN value, then the system uses VesselVoyageNr. Otherwise, it uses vCarrier.Name

International Documents

SED

NOTE: For some carriers, such as DHL, hazardous materials may also be referred to as "dangerous goods".

Document Field	SendSuite Shipping Source	Notes
11 Port of Export	SH.PortOfExportName	
12. Port of Unloading	SH.PortOfUnloadingName	
13. Containerized	Yes if tblShipmentLine. ContainerCount > 0 Otherwise, No	
14. Carrier Identification Code	vCarrier.CarrierSCAC	
15. Shipment Reference No	SH.BillNr	
16. Entry Number	IL.EntryNr	If there is more than one product, then this code will print with the products in field 22.
17. Hazardous Materials	Checked if tblCommodity. Hazardous = 1 Otherwise, not checked	
18. In Bond Code	IL.InBondCode	If there is more than one product, then this code will print with the products in field 22.
19. Routed Export Transaction	Yes if SH.AgentID <> SH.ConsigneeID Otherwise, No	
21. D/F or M	IL.CountryMfgType	
22. Schedule B Number	IL.HTSNr IL.HTSDescription IL.EntryNr IL.InBondCode IL.SEDLicenseIL. SEDLicenseExpires	Prints all for each
23. Quantity - Schedule B Units	IL.HTSQuantity1 IL.HTSQuantityUnits1 IL.HTSQuantity2 IL.HTSQuantityUnits2	Prints all for each
24. Shipping Weight	(IL.NetWeight * IL.ProductQuantity)	The system automatically converts pounds to kilos.
25. VIN/Product Number/ Vehicle Title Number	IL.VIN_PIN IL.VehicleTitleNr	

International Documents

SED

Document Field	SendSuite Shipping Source	Notes
26. Values	IL.SEDValue OR (IL.UnitPrice * IL.ProductQuantity)	If no value is entered by the user in SEDValue, then the system creates a value based on the unit price and quantity
27. License No.	IL.SEDLicense	If there is more than one product, then this code will print with the products in field 22.
28. ECCN	IL.ECCN	
29. Duly authorized officer or employee	none, completed manually	
30. Signature	none, completed manually	
31. Authentication	none, completed manually	
Date	SH.ScheduledShipDate	
Telephone No.	vShipper.ShipperPhoneNr	

Shipping Screens

While the SendSuite Shipping user interface opens in a web browser window, it is set up on the Administrative Workstation.

SendSuite Shipping has several pre-loaded system templates. These templates can be used as shipping screens, or you can use them to create custom shipping screens.

Once you create a custom shipping screen, you can modify it at any time on the Administrative Workstation. The users will see the changes the next time they refresh the screen or click on the screen name.

After a screen has been configured, it can be exported as a file and saved to a disk. Screens that have been exported can easily be imported into the same system or on another system.

Creating a Custom Screen

NOTE: If you selected one of the system templates, you must give the screen a new name. You cannot save over a system template.

To create a custom screen:

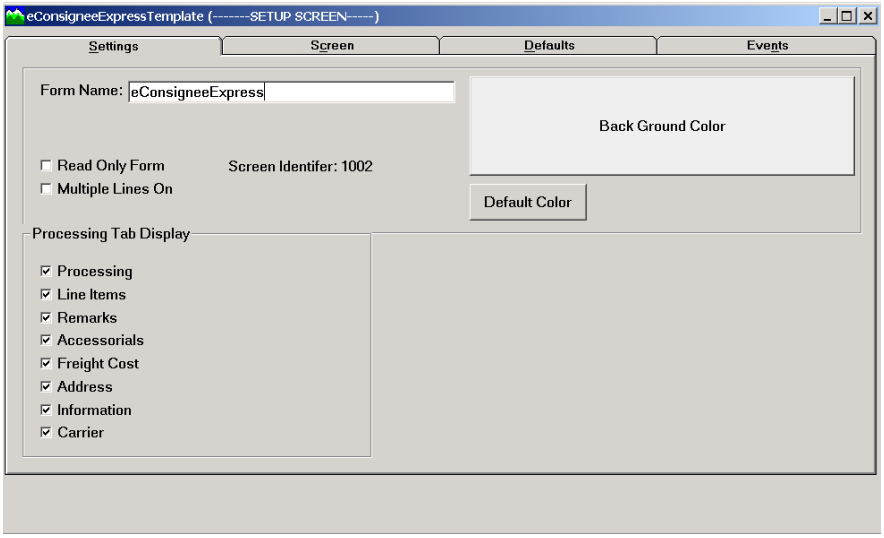
1. From the Control Center, open the **Shipping** module.
2. From the Setup menu, select **Setup Shipment Processing**.
3. Open the screen that you would like to change.
   - If you want to use one of the system templates, select the checkbox next to **Display System Templates**.
4. Select **Save As** from the File menu.
5. Type the name of the new template in the Form Name field.
6. Click **OK**.

Shipping Screens

Configuring the Appearance of the Shipping Screen

On the **Settings** tab, you have the following options:

- **Read Only Form** – If you check this box, the user will not be able to save any information. The user can perform any other action, such as rating.
- **Back Ground Color** – If you click on this button, you can change the background color of the shipping screen frame. The background color on the other frames will not be affected. If you want to return to the original system color, click the **Default Color** button.
- **Screen Identifier** – SendSuite Shipping automatically assigns a screen ID to every screen. You cannot change this ID, but you can use it with other features. See *Processing Events* in Chapter 3 and *Setting up Users* in Chapter 5.
- **Processing Tab Display** – Use these checkboxes to select what tabs display with the Shipping Screen. The user cannot access information for tabs not selected.



Shipping Screens

Configuring the Appearance of the Shipping Screen

Click the **Screen** tab, then follow the steps listed below to delete, add, or move fields on the shipment processing screen.

Delete Fields

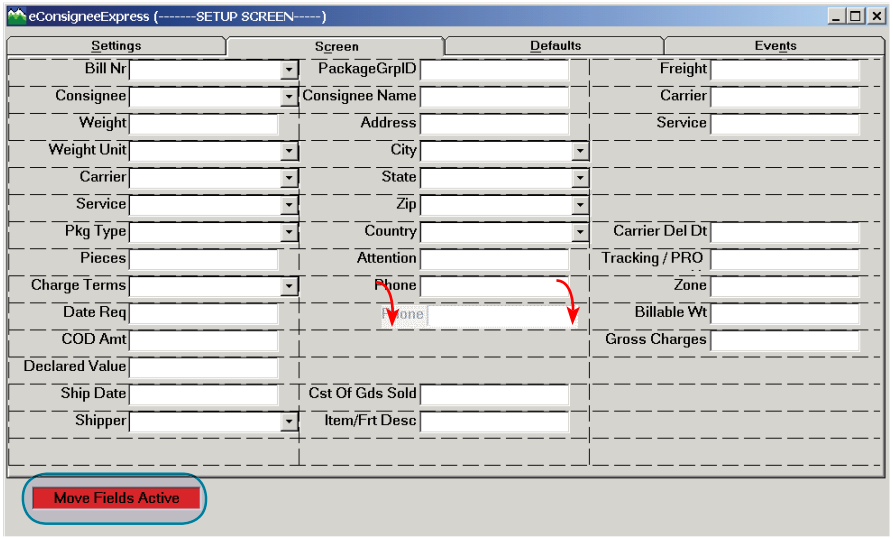
1. Click the cursor in the field you want to delete.
2. Right-click outside the field to display the menu.
3. Select **Delete Field**.

Add Fields

1. Right-click anywhere in the grey area on the Screen tab.
2. Select **Add Field**.
3. Double-click on the folder icon to open a table that holds the data you want to add.
4. Click and drag the table icon of the data you want to add to an empty line on the template.

Move Fields

1. Select **Move Fields** from the Options menu to activate the move fields function. Notice the *Move Fields Active* note in red at the bottom of the setup screen.
2. Click and drag a field to an empty line on the template.
3. Select **Move Fields** from the Options menu to turn off the move fields function.



Shipping Screens

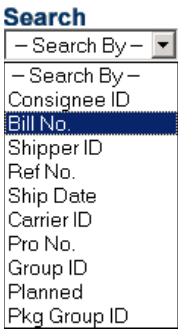
Configuring the Appearance of the Shipping Screen

Changing the Field Labels

You can change the name of a field. You may want to do this so the user can easily relate to the data. For example, SendSuite Shipping uses the Bill Number to keep track of the shipment. If the user is scanning an Invoice Number that becomes the Bill Number, then you can change the name of that field on the screen to read “Invoice Number”.

Although you can change the field label, you are not actually changing the field name on the database table. In the example above, the screen will display “Invoice Number” but that information will be saved in the *tblShipmentHeader.BillNr* field.

Also, if you use the Search feature on the shipping screen, the drop-down will still show Bill No.



NOTE: Internet Explorer uses the following letters as hot keys on their menu: **F, E, V, A, T, H**. If you assign one of these letters as a hot key for the SendSuite Shipping screen, your hot key takes precedence over the Internet Explorer menu.

Creating Hot Keys

You can create hot keys for quick navigation to select fields:

1. Left-click on the label of the field you want to change.
2. Type an ampersand (&) in front of the letter you want to be a hot key.

   For example, if you want to use the P in Pieces, change the label to **&Pieces**.

Shipping Screens

Field Properties

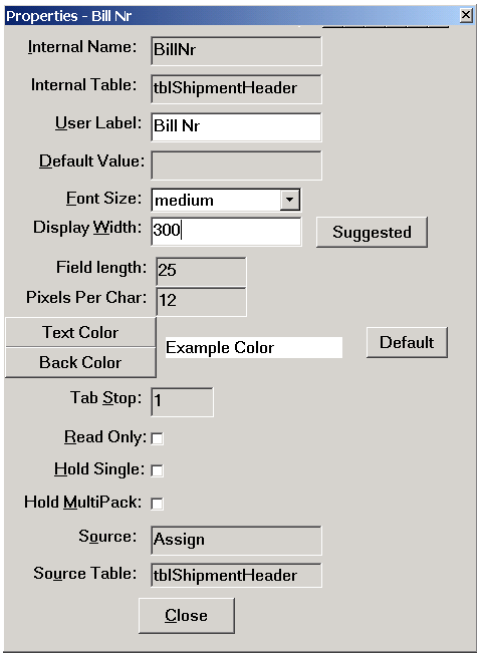
You can change the behavior of the fields on the screen. These behaviors include:

- Holding data from one shipment to the next
- Making a field read-only
- Setting a default value
- Changing the data source
- Requiring the user to input data before they can save a shipment

These properties can be set on the Screen tab, or on the Defaults tab.

Setting Properties on the Screen Tab

1. Click the **Screen** tab.
2. Click the cursor in the field you want to edit.
3. Right-click outside the field to display the menu.
4. Select **Field Properties**.
5. Make changes to any of the field properties listed in the Properties window (see below).
6. Click **Close**.



Shipping Screens

Field Properties

Property	Function	Values
Internal Name	Read only. Shows you the name of the field on the table in the database.	
Internal Table	Read only. Shows you the name of the table in the database.	
User Label	This is what will appear on the shipping screen.	Although this is a 256 character field, the label should be brief. The screen will resize itself to accommodate the text.
Default Value	Read Only. See Setting Properties on the Defaults Tab on page 3-28.	
Font Size	Selects the size of the text displayed on the shipping screen.	
Display Width	Use this field to specify the field's width on the shipping screen.	Click **Suggested** to let SendSuite Shipping determine an appropriate width.
Text Color	Defines the color of the text on the shipping screen.	Click **Default** to select SendSuite Shipping' defaults of black text on a white background.
Back Color	Defines the background color of the text field displayed on the shipping screen.	
Tab Stop	Obsolete. Although you can see the tab stop values, they have no affect on the behavior of the shipping screen.	

Shipping Screens

Field Properties

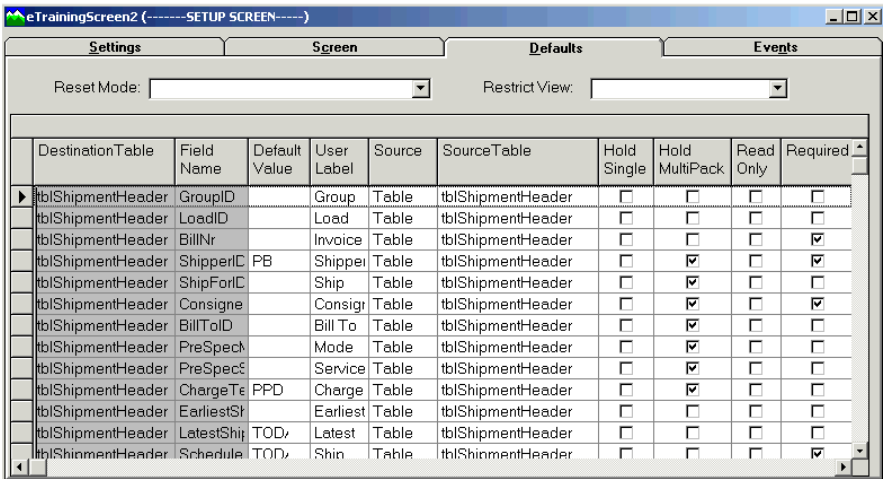
Property	Function	Values
Read Only	This prevents the user from adding or deleting information in the field.	Check this box to make the field read-only. Although you can remove the checkmark on some fields, it will still be a read-only field (e.g., TotalFreight). Read-only fields on the screen will have a yellow background.
Hold Single	When the New With Hold event is performed, this data will remain on the new shipment.	Check this box to keep the value from one shipment to the next.
Hold Multipack	When the New Shipment event is performed during a multipack session, this data will appear on the new shipment in the multipack.	Check this box to keep the value from one shipment to the next.
Source	Read only. See *Setting Properties on the Defaults Tab* on the next page.	
Source Table	Read only. See *Setting Properties on the Defaults Tab* on the next page.	

Shipping Screens

Setting Properties on the Defaults Tab

To set properties on the Defaults tab:

1. Click the **Defaults** tab.



2. Change the field properties on the screen.

Property	Function	Values
Default Value	When the **New with Default** or **Set Shipment Defaults** event is performed, this value will be placed in the field.	Values depend on the field. Some fields are just text fields, some fields have specific values that you must choose from a drop-down. In date fields, you can use a relative date by typing TODAY, then you can add or subtract days. For example, to default tomorrow's date in a field, type "TODAY+1".
User Label	This is what will appear on the shipping screen. This is the same user label that can be configured using the properties on the screen.	Although this is a 256 character field, the label should be brief. The screen will resize itself to accommodate the text.
Source	This tells you where the system is getting the data for the field.	
Source Table	If the Source is set to Table, this tells your table the system is getting the data for the field.	

Shipping Screens

Setting Properties on the Defaults Tab

Property	Function	Values
Hold Single	When the New With Hold event is performed, this data will remain on the new shipment.	Check this box to keep the value from one shipment to the next.
Hold Multipack	When the New Shipment event is performed during a multipack session, this data will appear on the new shipment in the multipack.	Check this box to keep the value from one shipment to the next.
Read Only	This prevents the user from adding or deleting information in the field. Read-only fields on the screen will have a yellow background.	Check this box to make the field read-only.
		NOTE: Although you can remove the checkmark on some fields, it will still be a read-only field (for example, TotalFreight).
Required	If this box is checked, the user must input data in this field in order to save the shipment. The field labels or required fields will appear in red text.	Check this box to make the field a required field.
		NOTE: Although you can remove the checkmark on some fields, they may still be needed for rating.

Processing Events

To create a Master Event that will be triggered while working in a shipment processing template:

1. Select **Setup Shipment Processing** from the Setup menu.
2. Select the template that will contain the event.
3. Click the **Events** tab.
4. Double-click on the **Processing Events** folder icon that will contain the sub-event.
5. Scroll through the list of **Available Sub-Events** to determine which sub event(s) you want associated with the event.
6. Click and drag the sub-event(s) folder icon(s) to the folder icon of the event that you selected in Step 4.

Shipping Screens

Processing Events

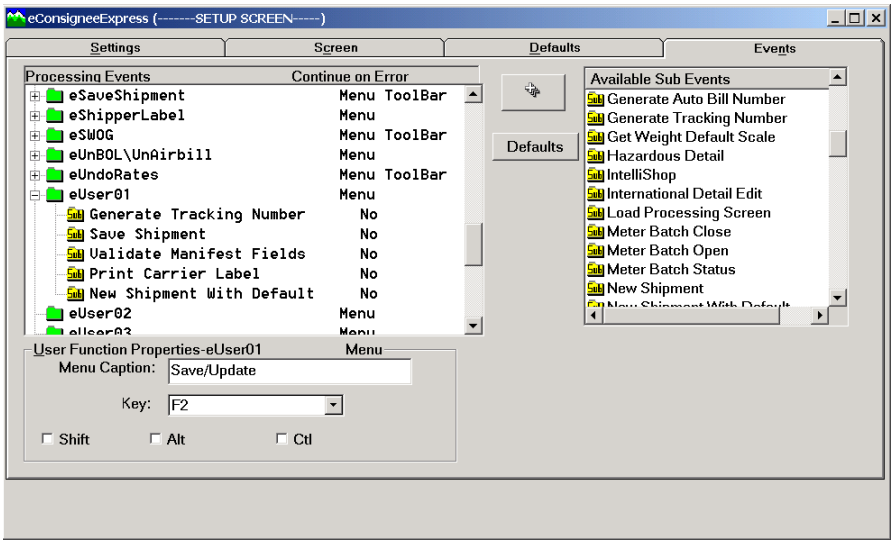
NOTE: You can allow an event to continue when a sub-event fails by enabling **Continue on Error**. To enable **Continue on Error**, select the sub-event and press the **Space Bar**.

7. Repeat Step 6 until you have assigned all necessary sub-events to the event.

> **NOTE:** Place the sub-events in the order they must occur. SendSuite Shipping processes each sub-event in the order they are listed in the event folder.

8. Type a name for the new shortcut key in the **User Description** field.

> **NOTE:** You can type a custom menu caption for every Master Event available (even non-custom events). The caption appears when the user hovers the mouse over the button on the Shipping Screen.



NOTE: You must select a key that is not already assigned subevents. The key you assign will also appear when the user hovers over the event on the processing screen.

9. (Optional): You can create a shortcut key for user defined processing events. When you do this, the user can press a key on the keyboard to execute the event, instead of using the mouse to click on the event.
   a. Click the drop-down arrow in the Key field to select a key that will trigger the sub-events you assigned to the user-configured event.
   b. If you want to add **Shift**, **Alt**, or **Control** to be pressed with the shortcut key, click the check box before **Shift**, **Alt**, or **Ctl**.
10. Click the save icon on the horizontal toolbar. 
11. Click **Close**.

Shipping Screens

Processing Events

Sub Event Descriptions

Sub-Event	Description
Add Change Consignee	Saves the information in the *vConsignee* fields to *tblAddress*. The **Move Shipment Screen Fields to Consignee Fields** parameter moves data from *tblShipmentHeader* to *vConsignee*.
Add/Change BillTO	Saves the information in the vBillTo fields to tblAddress.
Add/Change Carrier AcctNr	Saves the information.
Add/Change ShipFor	Saves the information in the vShipFor fields to tblAddress.
Address Verify Consignee	Validates the address on vConsignee. Check the box next to Save Consignee Info to update tblAddress. If tblAddress.Cleansed = 1, then the address is not verified again.
Bill of Lading	Prints the Bill of Lading. The ActualShipDate and the BOLPrinted flag are updated. This sub-event can only be used if the carrier service is LTL.
Billing Label	Prints a billing label.
Billing Label Multipack	This prints the billing label for an entire multipack.
Breakup Shipment	This creates a number of new shipments based on the number in the Pieces field. The multipack process does this automatically, use this sub-event to do it manually.
Carrier Terms & Conditions	Presents the DHL Carrier terms and conditions information sheet for international shipping.
Change Shipper	Changes the shipper address information during shipment processing.
Check Package Max Weight	This checks the max weight entered in the package attribute screen against the actual weight of the box. An error message is provided for overweight boxes, but this does not stop the shipment from being processed.
Clear Weight on Shipment	Deletes tblShipmentLine.Weight.
DeleteMPShipments	Deletes all the shipments in a multipack.

Shipping Screens

Processing Events

Sub-Event	Description
Delete Shipment	Deletes the current shipment. If the shipment is part of a consolidation or if it has been manifested, it cannot be deleted.
eMultiPack Auto	Starts the automatic multipack process. The user must specify the expected number of pieces. By default, the system will continue processing pieces as part of this multipack even after the last number is reached. To change this behavior, use the eMultiPack Auto Close sub-event.
eMultiPack Auto Close	This sub-event automatically stops the multipack session after the specified number of packages have been processed. Place this event in the eRate and Save master-event following the New Shipment sub-event.
eMultipack Close	Closes the multipack session. If the user has the consolidation option on, then the system attempts to consolidate the individual pieces into a hundredweight shipment. If the consolidation is successful, then the shipments are updated with the prorated cost. The first shipment is then read back in and displayed on the screen.
eMultiPack Loop Pieces	This is the main sub-event in the eAutoMultiPack master event. This sub-event tells the system to loop back to the first sub-event in the master processing event. When it detects that all pieces in a multipack have been processed, it allows the master event to proceed to the next sub-event. In the properties, check the box to Loop at Server if there is nothing else happening on the client. For example, if the master event is designed to process a shipment then print a label, then it cannot loop at the server; it must return to the client to print the label, then go back to the server for the other sub-events.
eMultipack Open	Starts a multipack session and creates the number of shipments indicated by the user.
Generate Auto Bill Number	Generates a new bill number based on the auto number setup in the Supporting Data Module
Generate Tracking Number	Creates a new tracking or PRO number using the setup from the Supporting Data Module.
Get Weight Default Scale	Brings in the weight registered by the default scale attached to the system. If there already is a weight assigned to the shipment, the scale will not override that value.

Shipping Screens

Processing Events

NOTE: For some carriers, such as DHL, hazardous materials may also be referred to as "dangerous goods".

Sub-Event	Description
Hazardous Detail	Opens a new browser window for EasyShip Platinum Web™.
Intellishop	Runs the Intellishop feature. You can turn off the calendar that shows the shipping dates by changing the Sub Event Properties.
International Detail Edit	Opens the window where international package detail information can be entered.
Load Processing Screen	Select the ID from the drop-down under the sub-event properties. When SendSuite Shipping encounters this sub-event, it will open the screen selected. pTable data will persist, so the user loses no information.
Meter Batch Close	This ends a meter batch that is currently open. If no meter batch is open, then this sub-event has no effect.
Meter Batch Open	This starts a batch process on a postage meter. The user must select the carrier called POST.
Meter Batch Status	This sub-event opens a display window showing the current status of a batch process running on a postage meter.
Meter Information	Presents a screen with your meter's information.
Meter Simulate Trip	This event causes the system to mark a POST (only) shipment as if it were ran through a postage meter for manifesting purposes. This is used when using a disconnected meter with the desire of sending confirmation services electronically through the SendSuite Shipping system for the pieces metered. This feature speeds up and standardizes the process of setting the shipment state so the end-of-day process can include the shipments in the transmission file.
Meter Trip Postage	Posts back to the client postage to set and trip the postage meter. The digital dashboard components must be installed for this to work.

Shipping Screens

Processing Events

Sub-Event	Description
Meter Undo Simulate Trip	This event removes the flags set on the shipment when using the Meter Simulate Trip task. When Meter Simulate Trip is executed, the shipment is frozen with no option of executing events such as Unrate against the shipment. Use this event in the case that a shipment that has had the Meter Simulate Trip event executed against it requires changes that cannot occur on a frozen shipment.
New Shipment	Creates a new shipment with blank fields.
New Shipment With Default	Creates a new shipment using the default values you set on the **Defaults** tab.
New Shipment With Hold	Creates a new shipment holding the values you set up on the **Defaults** tab.
ODBC	Runs an ODBC script. You must select the script in the Sub Event Properties box.
Power of Attorney Form	Presents a UPS-specific form for when you want to give UPS the power of attorney for the shipment. This is on a per shipment basis.
Present ERR Signature	Presents the electronic return receipt signature file for a POST tracking number.
Print Airbill	Prints a carrier's airbill on the printer you selected in the Peripheral setup. The ActualShipDate and the AirbillPrinted flag are updated.
Print Carrier Label	Prints the carrier's label on the printer specified in the Peripheral setup.
Print Carrier Label LAN	Prints the carrier's label on a network label printer.
Print Carrier Label Local	Prints to the server's local label printer to speed up printing time. This sub-event is only suitable for stand-alone SendSuite Shipping systems.
Print CODTAG	Prints a carrier COD tag, if applicable.
Print eCertified Cover	Prints a laser printed, certified bar code along with the ship-to and ship-from addresses.
Print eCertified Label	Prints an eCertified label for USPS or POST shipments. See *SVTS9146* for more information.

Shipping Screens

Processing Events

Sub-Event	Description
Print International Docs	If any of the following fields has a value of 1, then the system prints the document: tblShipmentHeader.ExportComInvoice, tblShipmentHeader.ExportCertificateOfOrigin, tblShipmentHeader.ExportNAFTA, tblShipmentHeader.ExportSED On the Sub Event Properties, check the box to print the documents directly to the printer. If the box is unchecked, then the user will see a preview of the document and will have to click the **Print** button.
Print Shipper Label	Prints a label you setup in the Supporting Data module.
Print USPS 2976 or 2976-A	Prints a 2976 or 2976-A customs declarations form for USPS international shipments.
Prompt Special Services	Generates a pop-up window that appears before or after rating, displaying the special services for the selected carrier. The shipper has the opportunity to select special services and validate costs before proceeding.
Prompt USPS Article Nrs	Prompts the user to enter or scan the tracking number for the selected service(s) of COD, Registered Mail, Insurance, and Certified Mail for both internal carrier IDs of USPS and POST.
Rate Quote	This sub-event will rate a shipment across all carriers, skipping any business logic.
Rate Shipment	Uses the current information on the shipping screen to rate the shipment.
Rating Decision Report	Prints the Rating Decision Report.
Rating Error Report	Prints the Rating Error Report.
Rating Summary Report	Prints the Rating Summary Report.
Read Bol Remark Append	Reads the BOL remarks from the Remarks table using the Remark ID. This appends together all of the remarks to the BOL Remarks field based on the BOL Remarks code.
Read Linked Account Set	Populates the account, sub account, sub sub account field based on the account set ID for the shipment.
Read Linked AltShipper	Populates the fields on vAltShipper with values from tblAddress based on the AltShipperID.

Shipping Screens

Processing Events

Sub-Event	Description
Read Linked BillTo	Populates the fields on vBillTo with values from tblAddress based on the BillToID.
Read Linked Carrier	Populates the fields on vCarrier with values from tblAddress based on the CarrierID.
Read Linked Consignee	Populates the fields on vConsignee with values from tblAddress based on the ConsigneeID.
Read Linked ShipFor	Populates the fields on vShipFor with values from tblAddress based on the ShipForID.
Read Linked Shipper	Populates the fields on vShipper with values from tblAddress based on the ShipperID.
Read Package Attributes	Populates package dimensions fields based on what the user selects in the Package Attribute ID field.
Read Shipment	Re-populates data in the pTable with values saved in the database. For example, if you search for a saved shipment, change information on the screen, then change your mind and want to go back to the original data, then this read information from the database and replace what you see on the screen.
Return Service Shipment	Generates a return label during shipment processing. The shipper's address is used as the 'ship to' address and the consignee's address is used as the 'return' address. Note that you must select the appropriate Return Shipment option on the **Special Services** tab to assess the proper charges for this feature
Save Shipment	Saves the data on the shipping screen to the database (saves the pTable values to the database)
Script Conditional Logic	Runs a conditional logic script written in VBScript that you set up in the Integration Module. You select the script in the Sub Event Property box.
Set Consignee Defaults	This sends the perm/temp flag to the *tblAddress*. This event is designed to be used after the ODBC In sub-event and prior to the Add/Change Consignee sub-event
Set Focus to Search	This places the cursor on the Search box on the shipping screen.
Set Shipment Defaults	Sets the defaults for a shipment. It can be used to override the values read in the database on a read shipment.

Shipping Screens

Processing Events

Sub-Event	Description
Shipment Form	This prints the Shipment Request Form. On the Sub Event Properties, check the box to print the documents directly to the printer. If the box is unchecked, then the user will see a preview of the document and will have to click the **Print** button.
Shipment Form New Account	This prints the Shipment Request Form with the accounting fields: AccountSetID, AccountID, SubAccountID, SubSubAccountID
Split Accounting Costs	This event displays a window for the currently selected shipment allowing the user to split charges across multiple accounts. This process can only be used on meter batch, meter discrepancy or previously split shipments.
SWOG Order	Opens the default SWOG Edit screen.
SWOG Order Scan	Presents a SWOG screen used to scan related orders for a shipment. Each scan is transmitted back to the server. The screen is designed for high-speed scanning of additional orders that are part of the shipment.
SWOG Shipment	Opens the Shipment SWOG Details screen.
SWOG Shipment Consolidate	Consolidates Express (package-based service), LTL, or Truckload shipments.
SWOG Shipment Load	Loads the SWOG table with shipment bill numbers.
Tab Accessorials	Jumps to the Accessorials tab on the Shipping screen.
Tab Address	Jumps to the Address tab on the Shipping screen.
Tab Carrier	Jumps to the Carrier tab on the Shipping screen.
Tab Freight Cost	Jumps to the Freight Cost tab on the Shipping screen.
Tab Information	Jumps to the Information tab on the Shipping screen.
Tab Line Items	Jumps to the Line Items tab on the Shipping screen.
Tab Processing	Jumps to the Processing tab on the Shipping screen.
Tab Remarks	Jumps to the Remarks tab on the Shipping screen.

Shipping Screens

Processing Events

Sub-Event	Description
UnBOL\UnAirbill	This removes the actual ship date and re-saves the shipment. This will clear the BOLPrinted or AirbillPrinted fields. It also will clear the ActualShipDate field.
Undo Simulate Trip	The clears the fields that were set from the Meter Simulate trip sub event.
Undo Rates	This removes routes and rates that were set by the Rate Shipment event, deletes the associated record from *tlbLoad*, and re-saves the shipment. If a tracking or PRO number was assigned to the shipment when it was rated, that number is removed. The next time the shipment is rated, a new tracking or PRO number will be generated. If the shipment has been manifested, the user will not be allowed to perform this sub-event.
Validate Manifest Fields	This checks to make sure all the fields needed for manifesting are complete. If a field required is not complete, then the system prompts the user.
Verify Account ID	Reads from *tblDivision* and verifies the AccountID exists in the table.
Verify Sub Account ID	Reads from *tblDepartment* and verifies the SubAccountID exists in the table.
Verify Sub Sub Account ID	Reads from *tblAccount* and verifies the SubSubAccountID exists in the table.
Void Post Manifest	This feature allows you to void a UPS® shipment after the manifest has been transmitted. The sub-event will take the use to myups.com where you can logon and void the package. The sub-event makes no changes to the data in SendSuite Shipping.
Void Online Postage	This feature is not supported at this time.
Void Shipment	This marks the shipment as Voided. A shipment cannot be unvoided.
Web Track	This uses an internet connection to track the shipment on the carrier's web site. No data from the carrier's web-site is saved in the SendSuite Shipping database.
XML File Link In	Brings data in using an XML File Link map set up in the Integration module.
XML FIle Link Out	Sends data out using an XML File Link map set up in the Integration module.

Shipping Screens

Processing Events

Sub-Event	Description
XML In Round Trip	XML In Round Trip imports data posted to SendSuite Shipping through the B2B XML Round Trip interface. This uses an XML map setup through the Integration module. Select the map name from the drop-down list.
XML Out Round Trip	XML Out Round Trip returns data from SendSuite Shipping to another application through the B2B XML Round Trip interface. This uses an XML map setup through the Integration module. Select the map name from the drop-down list.
XML Out This Shipment	This write the shipment information out to an XML file based on the map you set up in the Integration Module.
XML Rate Quote	Generates an XML rate quote. See *SVTS9131* for more details.

Shipping Screens

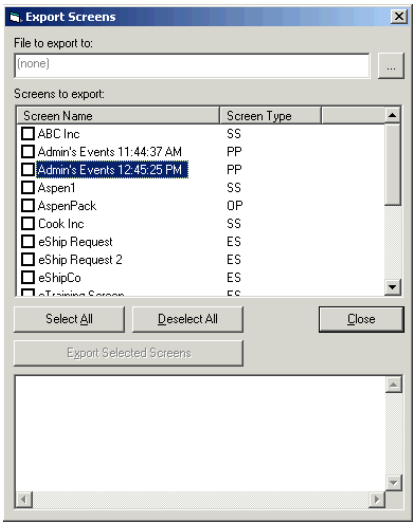
Exporting and Importing Screens

Screens can be exported to a file that is saved to disk. Exporting files can be useful for many reasons, including:

- ☐ Creating an backup copy of the screen. When you modify a custom screen and save it using the same name, there is no record of the original screen. By exporting the original screen, you have a copy that you can revert back to, if necessary.
- ☐ Assisting Pitney Bowes support staff with troubleshooting. If you encounter a problem with the system, there may be an issue with a custom screen. A Pitney Bowes representative may be able to diagnose the problem by importing a custom screen on another system. If the problem is corrected by modifying the screen, then the new screen can be easily imported.

Exporting Shipping Screens

1. You must close any screens you have open in this Shipping module on the Administrative Workstation.
2. From the **File** menu, select **Export Screen**.



3. Click the **Browse** button Browse..., then browse to where you want to save the export file. Name the file at this time.
4. Check the boxes next to the screens you want to export.

> **NOTE:** If you choose more than one screen, the system will save all the screens in the same *adtg* file. When you are importing screens, you have the option of which ones in the *adtg* file you want to import.

5. Click the **Export Selected Screens** button.
6. Click **Close**.

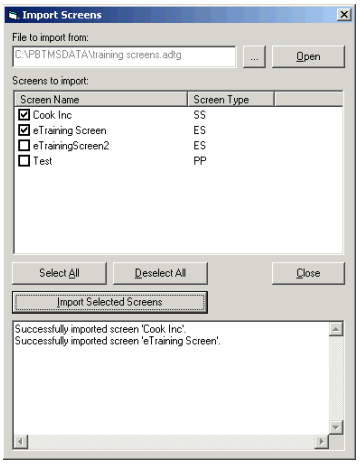
NOTE: SendSuite Shipping saves the file with an *adtg* extension. After you save the file, you can move it to a new location, copy it to a floppy disk, etc.

Shipping Screens

Exporting and Importing Screens

Importing Shipping Screens

1. You must close any screens you have open in this Shipping module on the Administrative Workstation.
2. From the **File** menu, select **Import Screen**.



NOTE: If the *adtg* contains multiple screens, you can choose only the ones you want to import by placing a checkmark next to them.

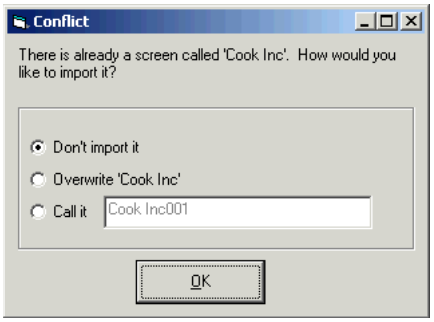
3. Click the **Browse** button 

, then browse for the file you want to import. Name the file at this time.
4. Click **Open**.
5. Check the boxes next to the screens you want to export.
6. Click the **Import Selected Screens** button.

Shipping Screens

Exporting and Importing Screens

7. If you are importing a screen that has the same name as a screen already in the system, you will be asked what you want to do with the screen in the system.



   - ☐ **Don't import it** — If you do not want to replace the screen that is already in this system, choose this option. This will not import the screen that is in the adtg file.
   - ☐ **Overwrite it** — If you want to replace the screen that is currently in the system, then choose this option. The screen on the adtg file will replace the one currently in the system.
   - ☐ **Call it** — If you want to import the screen, but give it a new name, then choose this option. Type the new name for the screen in the field provided. The screen currently in the system will remain in the system.

8. Check to make sure your screens imported successfully. A message confirming this should appear at the bottom of the screen.
9. Click **Close**.

Allowing User Access

By default, a user will have access to all screens in the system. You can restrict the screens that a user can see, therefore controlling what a user can do. To identify which screens a user will see when he/she logs on, see *Configuring Groups and Users* in Chapter 5 of this guide.

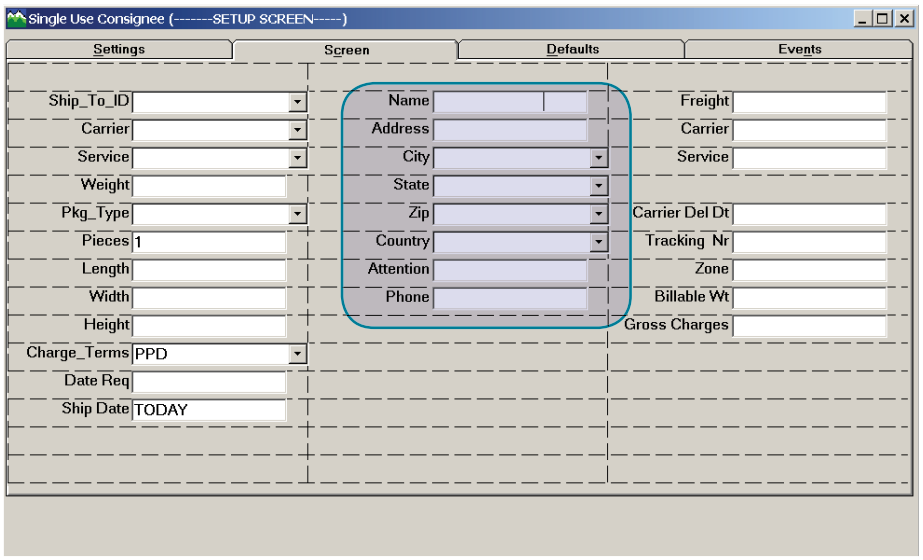
Single Use Recipients

You can create shipping screens that allow you to send shipments to one-time recipients. The recipient information is created on-the-fly and stored in the following, unique manner:

- When searching your address book, these addresses do *not* appear.
- When you delete the shipment, these addresses are automatically deleted.

To create a shipping screen that supports single use recipients:

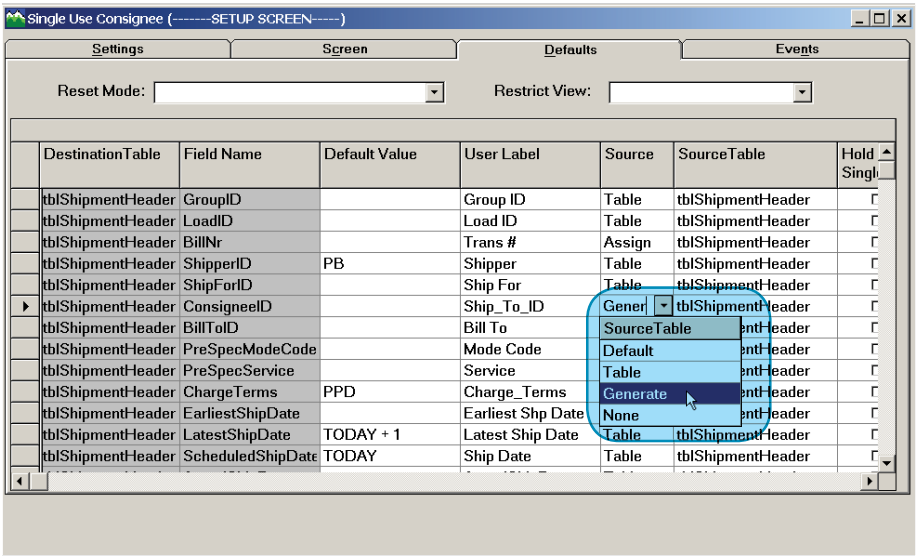
1. Create a new shipping screen of whatever tabs and appearance desired.
2. Click the **Screen** tab.
3. Adjust the screen so that the user can enter recipient information (such as Name, Address, City, etc.).



Single Use Recipients

NOTE: By selecting **Generate**, SendSuite Shipping will automatically generate a unique Consignee ID. To the user on the shipping screen, the Consignee ID will appear as a series of asterisks (*******).

4. Click the **Defaults** tab.
5. Click **Source** under the **Con**signeeID row.
6. Select **Generate** from the drop-down menu.



7. Configure the events as necessary on the **Events** tab.
8. Save and close the shipping screen.

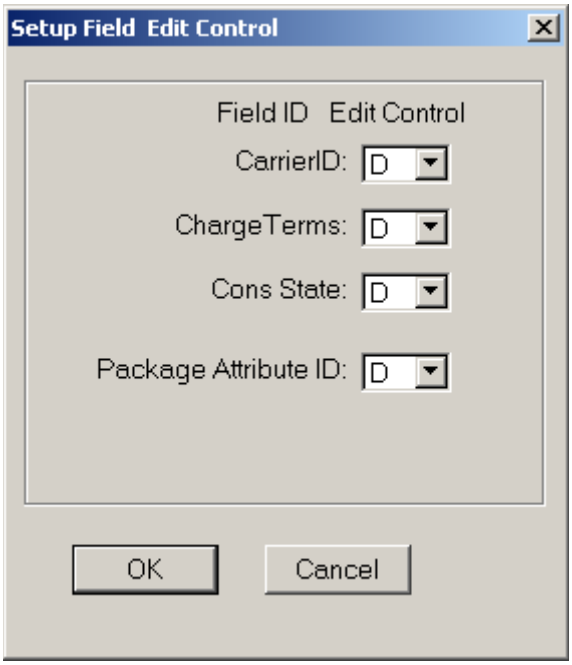
Single Use Recipients

Field Edit Control

You can adjust how users will look-up certain information while using a Shipping Screen.

To adjust the user look-up options:

1. Open the Shipping Module from the Control Center.
2. Click **Setup** > **Setup Field Edit Control**.



3. Adjust the lookup options for the following fields:
   - **CarrierID**: This is the field the used to select a carrier for the shipment.
   - **ChargeTerms**: This is the field used to select the charge terms for the shipment (such as Collect on Delivery).
   - **Cons State**: This field selects the recipient's state.
   - **Package Attribute ID**: This field is used to select a package attribute type. This sets the length, height, and maximum weight for the current shipment.
4. Toggle the following look-up options to best suit your needs:
   - (**D**) **Combo Drop Down**: Allows you to select information from a drop-down menu.
   - (**Q**) **Quick Lookup**: Allows you to select information from a list in a pop up window.

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4 Reports

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Running SendSuite Shipping Reports

Running a Report in SendSuite Shipping Format

SendSuite® Shipping contains templates for a number of reports. You can run a report in the SendSuite format or you can modify the format to suit your needs.

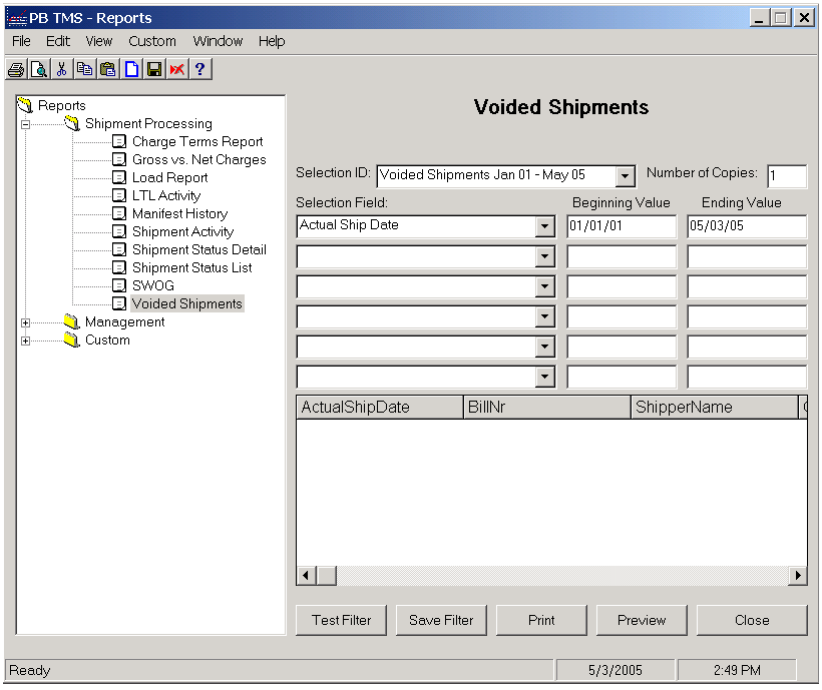
To run a report in SendSuite Shipping format:

1. Open the **Reports** module.
2. Use one of the following methods to open the folder containing the report:
   a. Double-click the folder name.
   b. Click the **+** to the left of the folder.
3. Double-click the name of the report you want.
4. If you want to print the report containing all possible data, then click **Print**.
5. If you want to print only selected data, then:
   a. Type information in the Selection Fields to filter the data (See *Creating and Saving Report Filters* below).
   b. Click **Print**.

Creating and Saving Report Filters

To create and save report filters:

1. Click the drop-down arrow under **Selection Field**.
2. Click the data you want to limit.
3. Type the **Beginning Value** and **Ending Value** that SendSuite Shipping should limit the report to.



4. Repeat the steps above for any additional data you want to filter out of the report.
5. Click the **Save Filter** button.

NOTE: The keyword **TODAY** can be used in values for filters, and can supply a range of dates relative to the current date. For example, a Beginning Date of **TODAY - 7** and Ending Date of **TODAY** would return data for the previous week.

Running SendSuite Shipping Reports

Creating and Saving Report Filters

NOTE: This filter can be selected the next time the report is run by clicking the drop-down arrow next to the **Selection ID** field.

6. Type the name of the filter.
7. Click the **OK** button.
8. (*optional*) Use the **Preview** button to generate the report using the entered criteria.
9. (*optional*) Use the **Test Filter** button to display the raw report data below the selection fields.

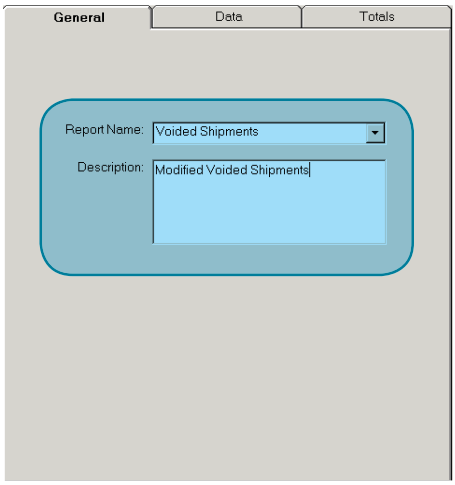
Creating Custom Reports

You can modify the column layout, data selection, and total columns for any of SendSuite's standard reports.

Selecting a Report to Modify

To select a report to modify:

1. Open the **Reports** module from the **Control Center**.
2. Click **Custom > Crystal Report** on the menu bar.
3. Click the drop-down arrow in the **Report Name** field and select the report you want to modify.



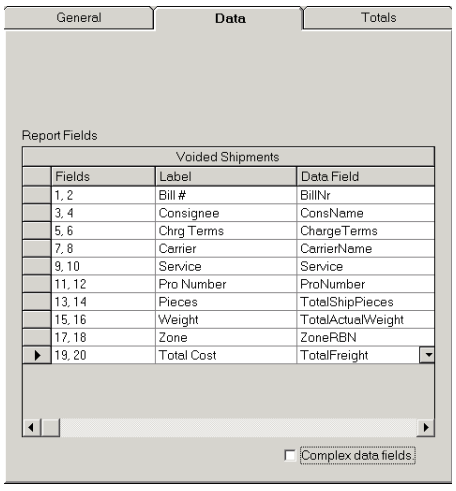
NOTE: You can only modify the data normally appearing on a report. For example, since the Shipment Activity report does not have order information on it, you cannot get the customer's purchase order number on that report.

4. Type a description of the report in the **Description** field (*optional*).

Modifying the Report Data

To modify the report data:

1. Click the **Data** tab in the Custom Report Interface window.

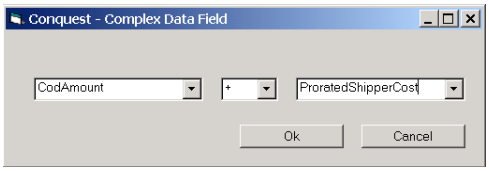


NOTE: The **Fields** column lists how the data will appear on the report. The odd numbers represent the column labels, and the even numbers represent the data fields. To change the order of information on the report you must change the contents of the **Label** and **Data Field** columns.

Creating Custom Reports

Modifying the Report Data

2. If you want to change the order of the data on the report:
   a. Highlight the text in the Label column and press **Delete**.
   b. Type a new label in the empty field.
   c. Select the data you want to appear on the report from the drop-down in the Data Field column.
   d. Repeat Step a through Step c for every column you want to change.
3. If you want to delete data from the report:
   a. Highlight the text in the Data Field column.
   b. Press the **Delete** key on your keyboard.
   c. Highlight the text in the Label column.
   d. Press the **Delete** key on your keyboard.
4. If you want a column to combine data (for example, calculate the difference between the Gross Charges and Total Shipper Costs):
   a. Select the **Complex data fields** box.
   b. Click anywhere in the Data Field column. The Complex Data Field window appears.



   c. Click the drop-down in the left-side of the Complex Data Field window and select the first field you want to use in your calculation.
   d. Click the drop-down in the center of the window and select “+” or “-”.
   e. Click the drop-down in the right side of the window and select the second field you want to use in your calculation.
   f. Click **OK**.

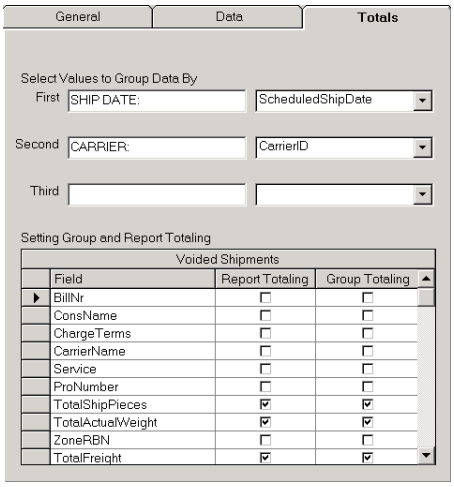
Creating Custom Reports

Modifying Data Groups

To modify data groups:

> **NOTE:** Many SendSuite Shipping reports group data within the report so you can easily summarize data. For example, if the first grouping is by consignee, SendSuite Shipping will total all the data for that customer. If the second grouping is by shipped date, SendSuite will break down each customer's data by date. If a third grouping is selected for carrier, SendSuite Shipping will total the carrier activity for a specific date by customer.
>
> Grouping is optional. If you wish, you can delete the SendSuite groups by highlighting the text field and data field and pressing the **Delete** key on your keyboard.

1. Click the **Totals** tab in the Custom Report Interface window.



2. Type the text you want for the groups in the fields next to **First**, **Second** and/or **Third**.
3. Click the drop-down arrow in the field(s) next to the group(s) you defined in step 2.
4. Select the field containing the data corresponding to the group you specified in step 2 from the drop-down in the field on the left.

Creating Custom Reports

Modifying Total Columns

To modify total columns:

1. Click the **Totals** tab in the Custom Report Interface window.
2. If you want a total for the entire report, click the box in the **Report Totaling** column next to the data field you want SendSuite to calculate.
3. If you want a total for a group within a report, click the box in the **Group Totaling** column next to the data field you want SendSuite to calculate.

Saving a Custom Report

To save a custom report:

1. Click the **Save Report** button.
2. Type a unique name for the report.
3. Click **OK**.

   NOTE: Custom reports are saved in the Custom folder on the left side of the main reports window. You can apply filters and run them the way you would run a standard SendSuite report. See *Running SendSuite Reports* on page 4-2 for instructions on how to apply filters.

NOTE: You cannot replace a standard SendSuite report with a custom report. You must give your report a new and unique name.

Importing External Reports

The standard reports for SendSuite were developed using Seagate Crystal Reports™. You may use Crystal Reports to create your own reports with data from the SendSuite database. Those reports can be run from Crystal in any manner you choose. You can get data from any SendSuite table.

If you want to import a Crystal report into SendSuite so it can be run in the SendSuite Reports module or from the SendSuite Task Scheduler, then you must follow the guidelines in this section.

> **NOTE:** The reports you create in this manner can only be run from an Administrative Workstation. If you want to run a report from the Shipping Workstation, please see *Creating Custom Reports for the Shipping Workstation* on page 4-11.

Availability of Data

When running a report, the SendSuite component looks for data from a limited set of tables and views. If you design a report that uses a table or view that is not supported, the report will not print in SendSuite.

Current List of Tables and Views Supported

To view the latest list of tables and views supported, follow these steps:

1. Open the **Microsoft SQL Server Query Analyzer**.
2. Run the following query:

   USE ConquestDB SELECT DataSourceName FROM pb_ tblReportFilterFieldList

Importing External Reports

Availability of Data

NOTE: Some views pull data from tables that are not currently in use. For example, if you were to use **vExportSLI** you would get no data on your report because your system is not populating data in these fields.

Data Available

Each table or view contains different information. Some of the common tables and views are explained below.

- **vReportShipmentLoads** — This view contains the information about a carrier's load. It contains the Shipment Header, Load and associated address information.
- **vReportShipmentLines** — The view contains the physical properties of the shipping goods and includes the multiple shipments linked to the Bill Number. It contains the Shipment Header, Shipment Line, Load, Cost, SWOG and address information.
- **tblStatusHeader** — This table contains information for the status of shipments that are checked by e-Track.
- **vShipper** — The view combines information form ***tblAddress*** and ***tblCountry***.
- **vReportShipments** — This view contains the Shipment Header and associated address information.
- **vConsignee** — The view combines information form ***tblAddress*** and ***tblCountry***.
- **vShipFor** — The view combines information form ***tblAddress*** and ***tblCountry***. The Ship-For address is a location such as a retail store where the goods will be forwarded by the customer.
- **vBillTo** — The view combines information form ***tblAddress*** and ***tblCountry***.
- **tblProduct** — This table contains information about products stored in the database. This table may or may not contain data, depending on whether you have chosen to store data in this table. For example, when exporting products, you must provide product detail which is stored in ***tblIntlLine***. Storing that information in ***tblProduct*** is optional.
- **vCarrierDeliveryDetailRpt** — This view contains information for the Carrier Performance Analysis Detail Report.
- **vCarrierDeliverySummRpt** — This view contains information for the Carrier Performance Analysis Summary Report.

Importing External Reports

You must also save the report format so that SendSuite formats the document correctly.

Exporting a Report from Crystal Reports

To export a report from crystal reports:

1. In Crystal Reports, from the File menu, verify that **Save Data with Report** is *NOT* selected.
2. From the File menu, select **Print**.
3. From the Print menu, select **Export**.
4. From the Format drop-down list, select **Report Definition**.
5. From the Destination drop-down list, select **Disk File**.
6. Click **OK**.
7. Save the export file (.**txt**) in the same directory as you saved the .**rpt** file.
8. Exit Crystal Reports.

Importing the Report into SendSuite Shipping

To import the report into SendSuite Shipping:

1. From the Control Center, open the **Reports Module**.
2. From the Custom menu, select **Crystal Report**.
3. From the File menu, select **Import Report**.
4. Locate the report you created and then click **Open**.
5. Enter a new name for the report to be imported and then click **OK**. The following message is displayed:

   User-Defined Report added successfully!
6. Click **OK** to clear the message box.
7. Click **Close** to return to the Reports window.

NOTE: When the report is imported a copy is placed in the Conquest Rpt directory.

Using the Report

To use the report:

1. In the Reports module, double-click the **User-Defined** folder.
2. Double-click the name of the report you created.

You can use this report in the same manner that you use other reports in SendSuite Shipping. For example, you can apply a filter to the information and you can imbed the report in the Task Scheduler. You also can designate the default printer where the report should print.

Creating Custom Reports for the Shipping Workstation

General Report Process

You can print custom documents or reports on the SendSuite Shipping Workstation. Reports can include summaries or single shipment reports. They also can include domestic or international documents, such as a bill of lading or a packing list.

SendSuite Shipping reports or documents that are produced on the Shipping Workstation (Thin Client) are run using Data Dynamics ActiveReports™. Your SendSuite Shipping system has a run-time version of ActiveReports built into it. This interface allows you to create custom documents that can be printed from the SendSuite Shipping screens.

To set up a custom report for the SendSuite Shipping Workstation:

1. Create or convert the new report. See below. Make sure that you complete the following:
   - ☐ Create or modify the data connection using an ActiveX Data Object (ADO).
   - ☐ Write the error handling script.
2. Write a VBScript to run the report. See *Writing VBScript* elsewhere in this chapter.
3. Embed the VBScript in a shipping screen as a sub-event. See *Processing Events* in Chapter 3 of this guide.

Creating Custom Reports for the Shipping Workstation

Creating a New Thin Client Report

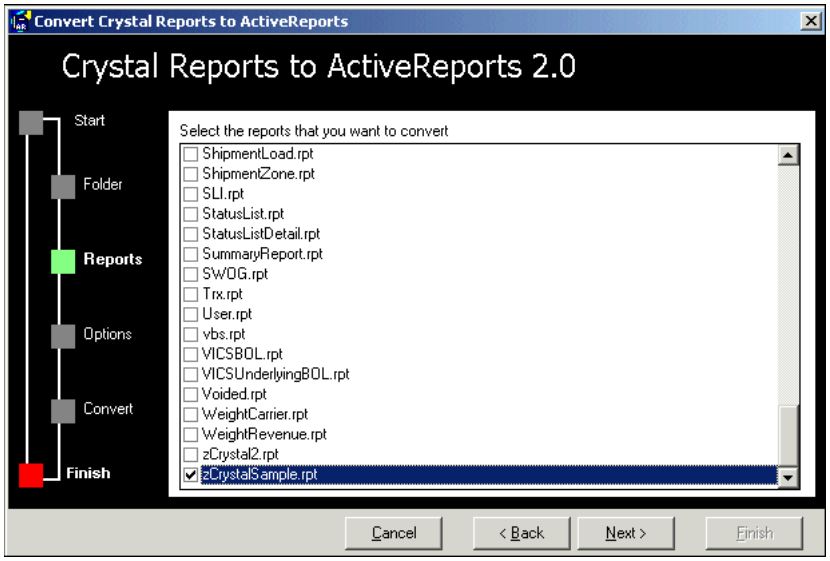
There are two ways you can create a Thin Client report:

- ☐ Convert an existing Seagate Crystal Reports™ document into ActiveReports. If you are familiar with Crystal, you can create new reports using that application and convert them into ActiveReports. See *Converting a Crystal Reports Document* elsewhere in this chapter.
- ☐ Develop the report from the ground up using the run-time version of ActiveReports in SendSuite. See *Creating a New Report from Scratch* elsewhere in this chapter.

Converting a Crystal Reports Document

To convert Crystal Reports to ActiveReports:

1. From the Control Center, select the **Reports** module.
2. From the Custom menu, select **Import Crystal Report to ActiveReport**.
3. Click **Next**.
4. Click the ellipsis [...] and then locate the directory where your Crystal report is saved.
5. Click **Next**.
6. In the list of reports, find your report and click in the selection box next to it.



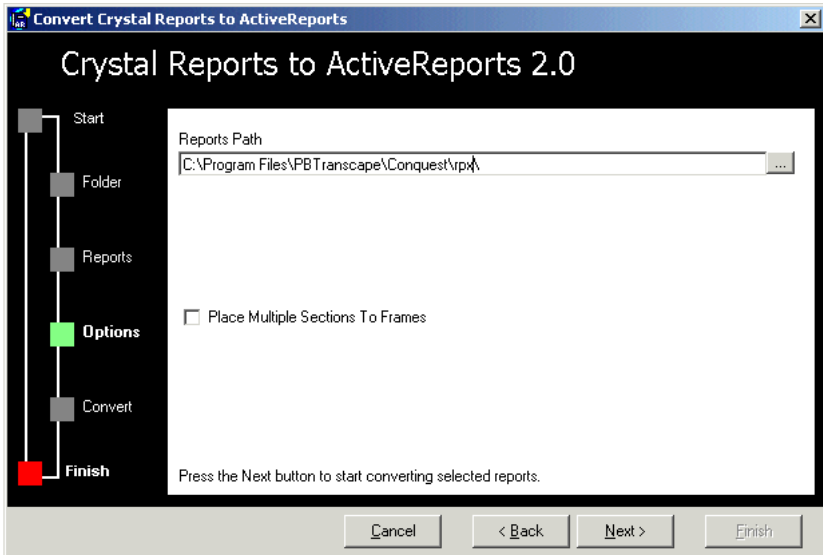
7. Click **Next**.
8. On the Options screen in the Wizard, select the path where the new ActiveReport will be located. The standard path for these is:

   C:\Program Files\pbTranscape\Conquest\rpx\

Creating Custom Reports for the Shipping Workstation

Creating a New Thin Client Report

9. Make sure that the **Place Multiple Sections To Frames** checkbox is unselected.



10. Click **Next**.
11. When the conversion process has finished, click **Finish**.
12. You may need to correct the name of the report if it has both **rpt** and **rpx** file extensions.
13. You may need to change the data controls. The SendSuite interface supports only ADO data controls.
14. Create the error handling script in ActiveReports. See *Scripting on the Report* elsewhere in this chapter.
15. Build the script that will call the report on the Thin Client. See *Writing VB Script* elsewhere in this chapter.

Creating Custom Reports for the Shipping Workstation

Creating a New Thin Client Report

NOTE: If you are familiar with Crystal Reports, you can use that application to create new reports and then convert them into ActiveReports using the process above.

Creating a New Report from Scratch

To create a new report from scratch using the ActiveReports interface in SendSuite Shipping:

1. Before you begin designing the report, you need to define the data you will pull onto the report. See *Defining Data* elsewhere in this chapter.
2. From the Control Center, select the **Reports** module.
3. From the Custom menu, select **ActiveReports**.
4. Configure the report header and add groups if necessary.
5. Build your report using the vertical toolbar on the left side of the design window. For a definition of the buttons, see *Toolbar Buttons* elsewhere in this chapter.
6. Save the report. You must save the report in the following directory:

   C:\Program Files\pbTranscape\Conquest\rpx\
7. Write the VBScript to run the report. See *Writing VBScript* elsewhere in this chapter.

Creating Custom Reports for the Shipping Workstation

Defining Data

Although ActiveReports is designed to use several different data types, SendSuite will only work with ActiveX and XML. When designing the report, you must use one or the other of these data objects:



Creating a New Thin Client Report

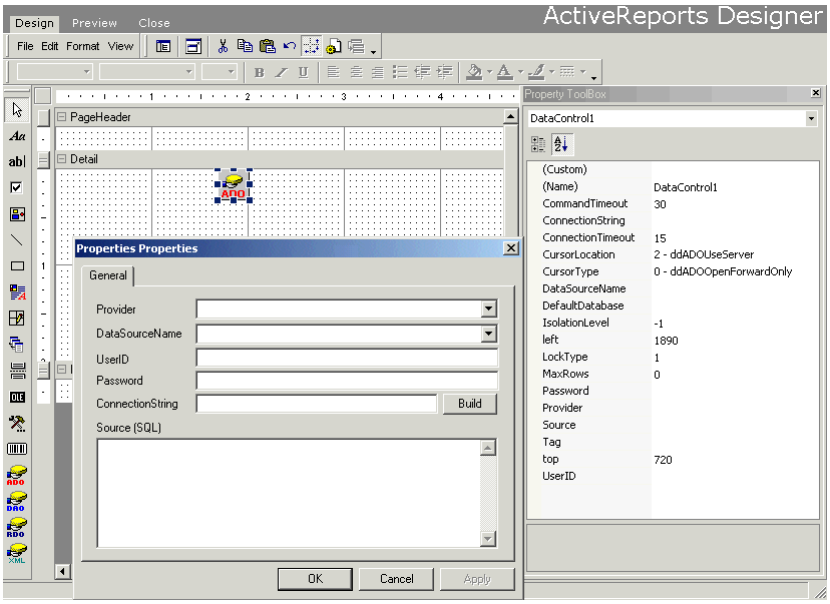
For reports on SendSuite Shipping data, ADO is all that is needed.

To create the database connection:

1. Click the **ADO** button on the tool bar.
2. In the detail area of the design window, click and drag to create the ADO connection (you do not need to be precise when creating the ADO connection since the box resizes itself to the same size as the icon).
3. Use the **Property Toolbox** on the right side of the window

   - OR -

   Right-click the ADO object and select **Properties** to open the Properties Dialog Box.



4. Define the database connection using one of the following methods:

   ☐ Complete the following fields in the Property Toolbox or Properties dialog box:

   - **DataSourceName**—You will see a list of the available DSNs on your system. Use pbSQLData to connect to the SendSuite database.
   - **Default Database**—If you used the pbSQLData DSN, the you do not need to specify the database, since the default database is built into the DSN. The SendSuite database is ConquestDB.

NOTE: A pre-configured DSN is installed on the server: pbSQLData, UserID ConquestUser, (password **transcape**) retrieves all the data that's needed.

Creating Custom Reports for the Shipping Workstation

Creating a New Thin Client Report

- **UserID**—ConquestUser is the user ID that connects to the SendSuite SQL data.
- **Password**—The password for ConquestUser is transcape.

☐ **Complete the Connection String**—The Connection String contains all the data the object will need in order to connect to the database. This includes the database name, SQL user, password. The Properties Dialog Box has a tool to help you build a Connection String.

The string may look something like this:

Provider=SQLOLEDB.1;Persist Security Info=False;User ID=conquestuser; Password=transcape;Initial Catalog=ConquestDB

NOTE: Unlike reports that are run from the Admin Workstation, you may use any table or view for the Thin Client report data. You may join tables together, or you can create your own views for data.

5. Identify the data you will pull onto the report. You may either use an SQL statement or you may call a stored procedure. Write the statement in the Source field in either the Property Toolbox or Properties Dialog Box.

   The statement you write here will only be used when viewing the report in the designer. The actual query will be made by the VBScript that runs the report. Ideally, the two should be the same.

   The SQL statement may look something like this:

   select * from vReportShipmentLoads

   A stored procedure call may look something like this:

   csp_EQRptExportSLI ‘020719TS0204’, ‘’

6. Continue designing the report using the other tools (see *Toolbar Buttons* elsewhere in this chapter).

Creating Custom Reports for the Shipping Workstation

Creating a New Thin Client Report

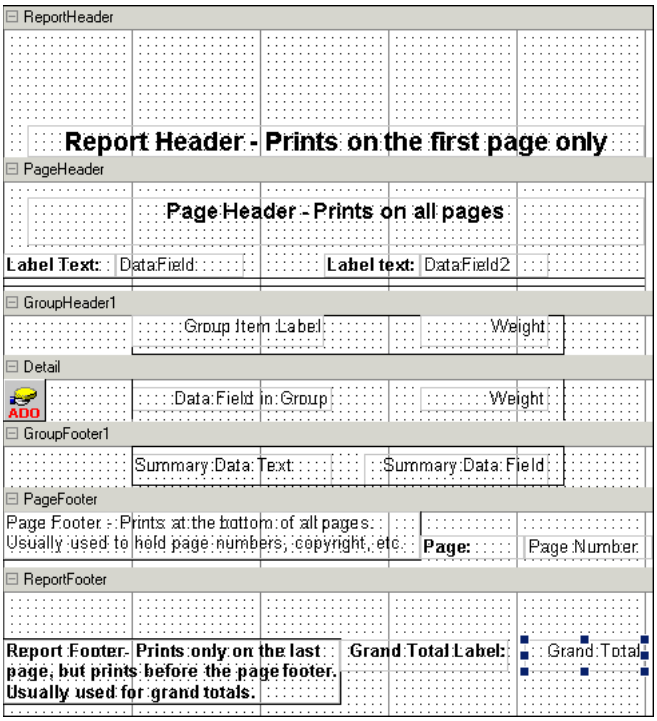
Headers and Footers

Every report has a **page header** by default. Any fields you place in this area will appear at the top of the every page of the report.

If you want a different header on the first page of the report, then you must insert a report header.

To insert a report header or footer:

1. Right-click in the body of the report design window.
2. From the pop-up menu, select **Insert**, then select **Report Header/Footer**.



Creating Custom Reports for the Shipping Workstation

Creating a New Thin Client Report

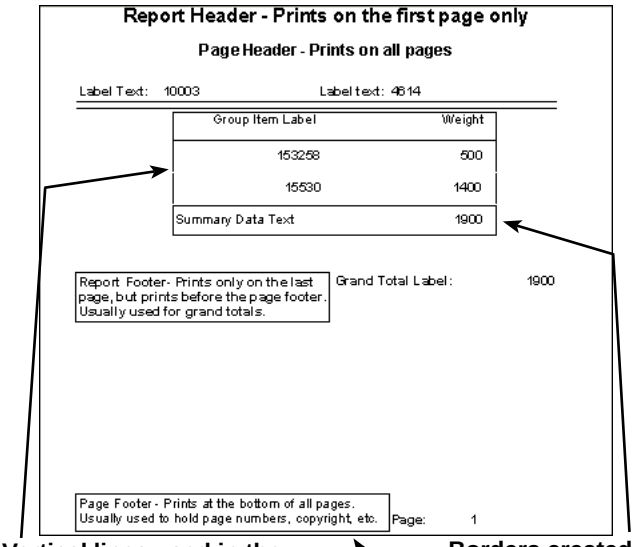
Grouping

If you have data that has some common element, then you can group that information together and have the report provide you with a subtotal.

For example, you can create a group for different shippers, so that one report can show you totals for each shipper and then give you one grand total at the end.

To insert a group:

1. Right-click in the body of the report design window.
2. From the pop-up menu select **Insert**, then select **Group Header/Footer**.


Report Header - Prints on the first page only
Page Header - Prints on all pages
Label Text: 10003
Label text: 4614
Group Item Label
Weight
153258
500
15530
1400
Summary Data Text
1900
Report Footer- Prints only on the last page, but prints before the page footer. Usually used for grand totals.
Grand Total Label:
1900
Page Footer - Prints at the bottom of all pages. Usually used to hold page numbers, copyright, etc.
Page:
1

Vertical lines used in the Detail section. They line up with the shaped used in the Group Header and Footer sections.

This border was applied to the Text Box using the Format menu.

Borders created using the Shape tool.

Creating Custom Reports for the Shipping Workstation

Creating a New Thin Client Report

Summary Fields

In the footers, you can summarize your data by applying the following functions.

- ☐ Sum
- ☐ Count
- ☐ Maximum
- ☐ Average
- ☐ Minimum
- ☐ Variance

To apply a summary, create a text box in a footer and then modify the settings in the Property Toolbox:

1. In the SummaryFunc field, select the type of summary you want to print.

SummaryFunc	0 - ddSFSum
SummaryGroup	GroupHeader1
SummaryRunning	2 - ddSRAll
SummaryType	3 - ddSMSubTotal

2. If the summary is for a group, select the group name in the SummaryGroup field. Otherwise, leave this field blank.
3. If you want a total on each page, select an option from the SummaryRunning drop-down. You must make a selection from this drop-down.
   - If you want the running total to reflect just the current group, select **1-ddSRGroup**.
   - If you want the running total to reflect the values from all groups, select **2-ddSRAll**.
4. From the SummaryType drop-down, select the type of summary you want to print. You must make a selection from this drop-down.
   - Use a **Grand Total** in the report footer.
   - Use a **Sub Total** for a group footer.
   - Use a **Page Count** in the page footer.

Creating Custom Reports for the Shipping Workstation

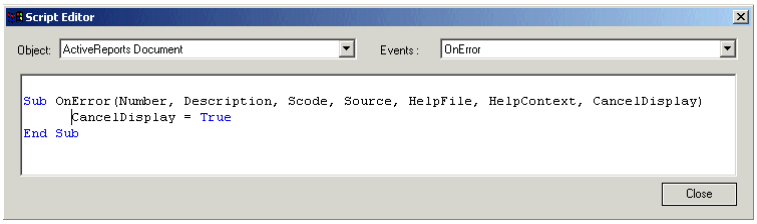
Creating a New Thin Client Report

Scripting on the Report

You can run VBScript within the report. These scripts can be used for a variety of purposes, including assigning a value to a field. This includes printing a date and time on the report. If ActiveReports encounters an error, the component may lock on the server. Therefore, you *must* build the following script into your ActiveReport.

1. Select the scripting tool.
2. From the Object drop-down, select **ActiveReports Document**.
3. Delete the existing text.
4. From the Events drop-down, select **OnError**.
5. In the sub-routine body, type the following:

   CancelDisplay = True

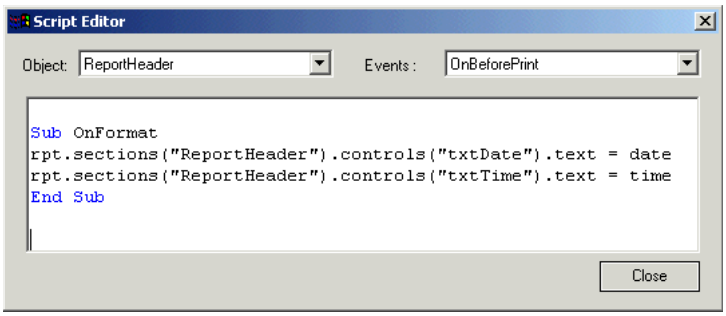


6. Close the scripting window.

For other scripts, follow these general instructions:

1. To assign a script, select the scripting tool.
2. From the Object drop-down, select what section of the report the script applies to. For example, if you are assigning a value to a field in the report header, select **ReportHeader**.
3. In the sub routine, type your script. The system defaults to **OnFormat**, which means that the script will run when the report is formatted. If you want the script to run when the report is printed, select **OnBeforePrint** from the Events drop-down.

   For example, if you want to print the run date in the report header, then set up the script like this:



   This example assumes that you have two data fields on your report called txtDate and txtTime.

NOTE: The script runs on the server, meaning that the time it prints on the report is the time on the server.

Creating Custom Reports for the Shipping Workstation

Creating a New Thin Client Report

Toolbar Buttons

To use a tool, click the desired button on the toolbar. Then, in the report design window, click and drag to create the space where you want that feature. You can move items later by using the cursor tool and dragging or re-sizing items. However, if you want to move an item from one section to another (for example moving a date from a group header to a page header), you must cut and paste the item (you cannot drag from one section to another).

	**Cursor**—Use this tool when you want to select an existing item on the report.
	**Label**—This tool creates a text field on the report. Use this for report titles and field labels. Once you have placed the field on the report, you can modify the format using the **Property Toolbox**. For example, you can modify the font by selecting the ellipsis.
	**Text Box**—Use this tool to create the fields on the report for your data. Before you use this tool, you need to define the date on your report. See *Defining Data* elsewhere in this chapter. You can create the text box on the design window and then select the DataField in the **Property Toolbox**. You also can create a list of fields on the screen and then drag and drop the fields. To view the list of available data fields, click the **View** menu and then select **Explorer**. If you do not see your fields, click the refresh button. 
	**Image**—Use this to place a graphic on the report. This can include logos. It also can include a signature that you have saved as a graphic. You can use various bitmap image types, such as .bmp, .gif and .jpg.
	**Line and Shape**—Use these tools to draw lines or boxes on the screen. The can be used to create borders around text or to separate sections or fields. You can create a border around a text field by using the **Format** menu. Select the field you want to border, then select the **Format** menu, then select **Format Border**.
	**Rich Edit Control**—This tool creates a box on the report design window. You can place labels and text fields in this area, grouping them together. Text that you type directly into the Rich Control area will appear on the design window but not on the actual report. This allows you to put notes on the report without having them print.

Creating Custom Reports for the Shipping Workstation

Creating a New Thin Client Report

	**Frame**—This creates a frame or frames on the report. Like the Rich Control Edit tool, objects you place in these frames will be grouped together. Once you create a frame, you can split the frame horizontally or vertically into multiple panes. To split a pane, click one of the split tools.  If you want to delete a pane, click the delete icon in that pane. 
	**Sub Report**—Do not use this tool with SendSuite Shipping.
	**Page Break**—Use this tool to create a page break. When you run a report, it will create a new page when there is more data than will fit on a page. This tool creates a page break in a specific spot on the report.
	**OLE Object**—Object Linking and Embedding (OLE) allows you to link to an item created in another application and embed it in your report. For example, if you exported data to Microsoft® Excel and created a chart, you can link to that chart whenever you run the report. If the chart is updated, then the updated version of it will appear in the report.
	**ActiveX Control**—Use this tool to insert an ActiveX control. These controls allow Internet Explorer to interact with other applications. In general, these are not necessary for SendSuite reports.
	**Barcode Control**—If you want to print text in barcode format, you must use this tool.
	**ADO Data Control**—In most cases, you will use an ActiveX Data Object to connect to the SendSuite database to get information.
	**DAO Data Control**—These controls are not used with SendSuite since the information must be presented on the Thin Client.
	**RDO Data Control**—These controls are not used with SendSuite since the information must be presented on the Thin Client.
	**XML Data Control**—An alternative to using an ADO connection is to get data from an XML string.

Creating Custom Reports for the Shipping Workstation

Writing VB Script

You must call two components on the server in order to run the report. You can write your own report, or you can modify one provided to you on the server. The first component gathers the specific data you are looking for. The second component finds the report format and then displays the report on the browser. The second component call also creates a file with an **rdf** extension in the eQuest Temp directory on the server.

- ☐ pbCQEDataServicehelper.clsDBHelper.RunSQLReturnRS(your SQL statement, Null)
- ☐ pbCQEUserRpt.clsUserRpt.ProcessRPX(your report name, the record set created by the ServiceHelper, the user's session ID)

Modifying Sample Scripts

Three sample scripts have been included with SendSuite Shipping. After creating a report, you can modify one of these scripts to run your specific report.

The report name is part of the script, so if you created multiple reports, you will need multiple scripts—one script per report.

Each script was written for a different report call:

- ☐ **ADO** — shipmentactivity.itg was created for ActiveX Data Objects using a SQL statement.
- ☐ **XML** — shipmentactivityXML.itg was created for XML data.
- ☐ **Stored Procedures** — SLI.itg was created for ActiveX Data Objects calling a stored procedure.

These scripts are included in SendSuite Shipping, but you will not find them in the Integration module. You must first import the script and then modify it.

Importing the Script

NOTE: The File menu changes when other integration maps are open. You must close all maps before importing a map.

To import a script:

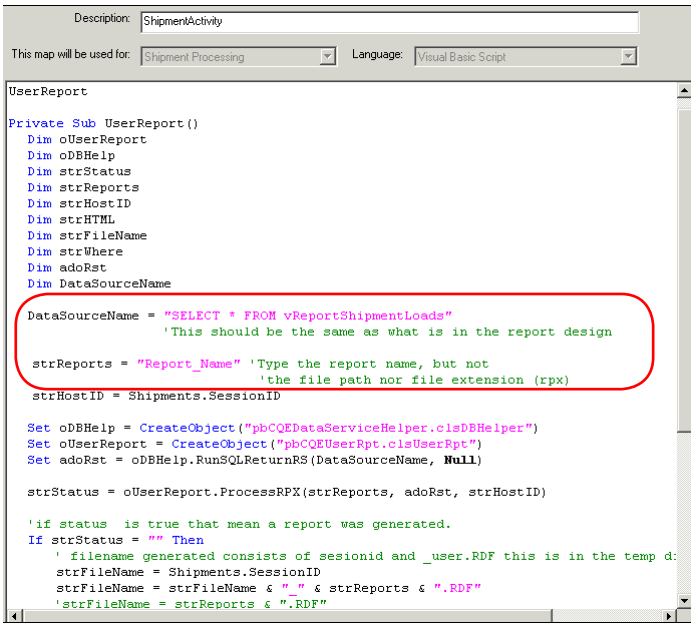
1. From the Control Center, open the **Integration** module.
2. From the **File** menu, select **Import**.
3. Select the map you want to import. They are all in the same directory:

   C:\Documents and Settings\All Users\Pitney Bowes\SendSuite Shipping\dat\Integration\
4. Click the **Import** button.
5. The file is automatically saved, however the script name may be different from the physical file name:
   - ☐ shipmentactivity.itg = UserReportTables.vbs
   - ☐ SLI.itg = SLI.vbs
   - ☐ shipmentactivityxml.itg = ShipmentActivityXML.vbs

Creating Custom Reports for the Shipping Workstation

Writing VB Script

6. Modify the following variables:
   - ☐ **DataSourceName**—In quotations, type the SQL statement you will use to select the data for the report. This should be the same as the SQL statement you wrote in the report design.
   - ☐ **strReports**—In quotations, type the name of your report. Do not include the file path nor the file extension. The SendSuite Shipping component will look in **C:\Program Files\pbTranscape\Conquest\rpx** for the report.


Description: ShipmentActivity
This map will be used for: Shipment Processing
Language: Visual Basic Script
UserReport
Private Sub UserReport()
Dim oUserReport
Dim oDBHelp
Dim strStatus
Dim strReports
Dim strHostID
Dim strHTML
Dim strFileName
Dim strWhere
Dim adoRst
Dim DataSourceName
DataSourceName = "SELECT * FROM vReportShipmentLoads"
'This should be the same as what is in the report design
strReports = "Report_Name" 'Type the report name, but not
'the file path nor file extension (rpx)
strHostID = Shipments.SessionID
Set oDBHelp = CreateObject("pbCQEDataServiceHelper.clsDBHelper")
Set oUserReport = CreateObject("pbCQEUserRpt.clsUserRpt")
Set adoRst = oDBHelp.RunSQLReturnRS(DataSourceName, Null)
strStatus = oUserReport.ProcessRPX(strReports, adoRst, strHostID)
'if status is true that mean a report was generated.
If strStatus = "" Then
' filename generated consists of sesionid and _user.RDF this is in the temp d:
strFileName = Shipments.SessionID
strFileName = strFileName & "_" & strReports & ".RDF"
'strFileName = strReports & ".RDF"

7. Save the script. Embed the script in a shipping sub-event.

Running the Report

To run the report, you need to call the VBScript you just created. To call a VBScript from the SendSuite Shipping Workstation, it must be set up as a processing sub-event. You can embed the script in an existing Master Event or you can create a new User Defined event.

For instructions on setting up the report sub-event, see *Processing Events* in Chapter 3 of this guide.

Accounting Reports

Unlike most reports in SendSuite, the accounting reports are run from the thin client. These reports detail the shipments and costs associated with each Account in the system.

Account Summary Report

The Account Summary report displays each Account, Sub-Account, and Sub-Sub-Account's activity for the time period specified. The information presented includes:

- ☐ **Pieces** — The total number of packages shipped for the specified time period.
- ☐ **Average Cost** — The average cost per package for the specified time period.
- ☐ **Total Cost**

PAGE 1 of 1

Account Summmary

Report Date: 12/05/2006 08:45 AM

Actual Ship Dates: 11/01/2006 - 12/5/2006
Shipper ID: ALL
Carrier ID: ALL

			Pieces	Avg. Cost	Total Cost
Shipper:	**PB**				
Account	**Sub Account**	**Sub-Sub Account**			
-----	-----	-----	135	$15.470	$2,088.500
Engineering	**Minnesota**	**Development**	4	$13.620	$54.480
Engineering	**Minnesota**	**QA**	3	$2.487	$7.460
Finance	**400**	**QA**	4	$1.305	$5.220
Finance	**Connecticut**	-----	4	$7.343	$29.370
Finance	**Minnesota**	-----	10	$8.543	$85.430
GMS	**600**	**Development**	2	$7.635	$15.270
	PB	Totals:	162	$14.109	$2,285.730
Grand Totals:			162	$14.109	$2,285.730

Accounting Reports

Transactions by Account Report

The Transaction by Account report lists the carriers and services used by each Account Set ID and the shipping charges incurred for a specified time period.

Transactions by Account Summmary
Actual Ship Dates: 11/01/2006 - 12/5/2006
Shipper ID: ALL
Carrier ID: FEDX - FEDX

PAGE 1 of 1
Report Date: 12/05/2006 08:58 AM

Shipper: **PB**
TranScape
7905 Golden Triangle Dr
Eden Prairie, MN 553447220

Account Set ID:
Account ID: Sub Account: Sub-Sub Account:

Carrier	Service	Pieces	% Pieces	Avg. Cost	Total Cost
FEDX	2PM	4	11.76%	$11.588	$46.350
FEDX	GRD	25	73.53%	$4.243	$106.070
FEDX	NEAM	1	2.94%	$73.630	$73.630
FEDX	NPM	4	11.76%	$23.900	$95.600
		34		$9.460	$321.650

Account Set ID: EMD(ENGINEERING MN DEV'T)
Account ID: **Engineering** Sub Account: **Minnesota** Sub-Sub Account: **Development**

Carrier	Service	Pieces	% Pieces	Avg. Cost	Total Cost
FEDX	HOM	1	50.00%	$7.690	$7.690
FEDX	NAM	1	50.00%	$26.660	$26.660
EMD		2		$17.175	$34.350

Account Set ID: FM(FINANCE MN)
Account ID: **Finance** Sub Account: **Minnesota** Sub-Sub Account:

Carrier	Service	Pieces	% Pieces	Avg. Cost	Total Cost
FEDX	GRD	1	100.00%	$5.370	$5.370
FM		1		$5.370	$5.370
Shipper Totals (PB):		37		$9.767	$361.370
Grand Totals:		37		$9.767	$361.370

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Configuring Groups and Users

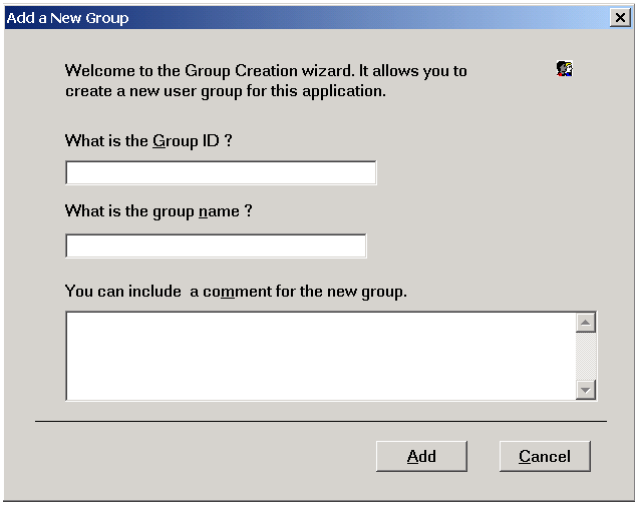
Setting Up Groups

NOTE: Pitney Bowes strongly encourages keeping security enabled. If you disable security, every user operates as an administrator and can make changes that might damage the system.

Configuring groups and users will establish levels of security in SendSuite® Shipping. To prompt the user to login, you must enable security. To do so, verify that **Security Enabled (ON)** is selected under the Security menu in the Tools module.

To set up a group:

1. Select the **Tools** module from the Control Center.
2. Select **Users/Groups** from the Security menu.
3. Open the **Users & Groups** folder.
4. Double-click **Create a New Group**.


Add a New Group
Welcome to the Group Creation wizard. It allows you to create a new user group for this application.
What is the Group ID ?
What is the group name ?
You can include a comment for the new group.
Add
Cancel

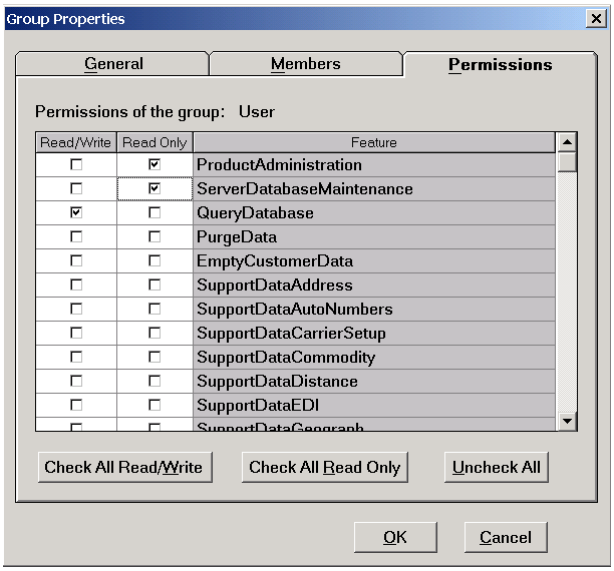
5. Type the Group ID.
6. Type the Group name.
7. Type a Name and Comments (*optional*).
8. Click **Add**.
9. Right-click the group you just created.
10. Select **Properties**.

Configuring Groups and Users

Setting Up Groups

TIP: To quickly give the group read and write access to all features, click the **Check All Read/Write** button. See *Security Permissions* elsewhere in this chapter for descriptions of each security permission.

11. Click the **Permissions** tab.

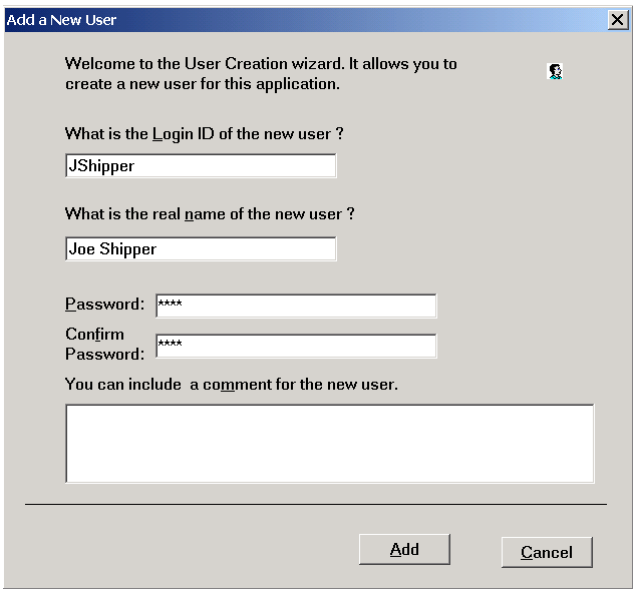


12. Assign permissions for the group by clicking in the boxes to the left of the desired features.
13. Click **OK**.

Configuring Groups and Users

Setting Up Users

1. Select the **Tools** module from the Control Center.
2. Select **Users/Groups** from the Security menu.
3. Open the **Users & Groups** folder.
4. Double-click **Create a New User**.


Add a New User
Welcome to the User Creation wizard. It allows you to create a new user for this application.
What is the Login ID of the new user ?
JShipper
What is the real name of the new user ?
Joe Shipper
Password:
****
Confirm Password:
****
You can include a comment for the new user.
Add
Cancel

5. Type the user's Login ID and Password. The Real Name is optional.
6. Comments are also optional. Most comments you input are plain text that can only be seen by the administrator.
7. Click **Add**.

Configuring Groups and Users

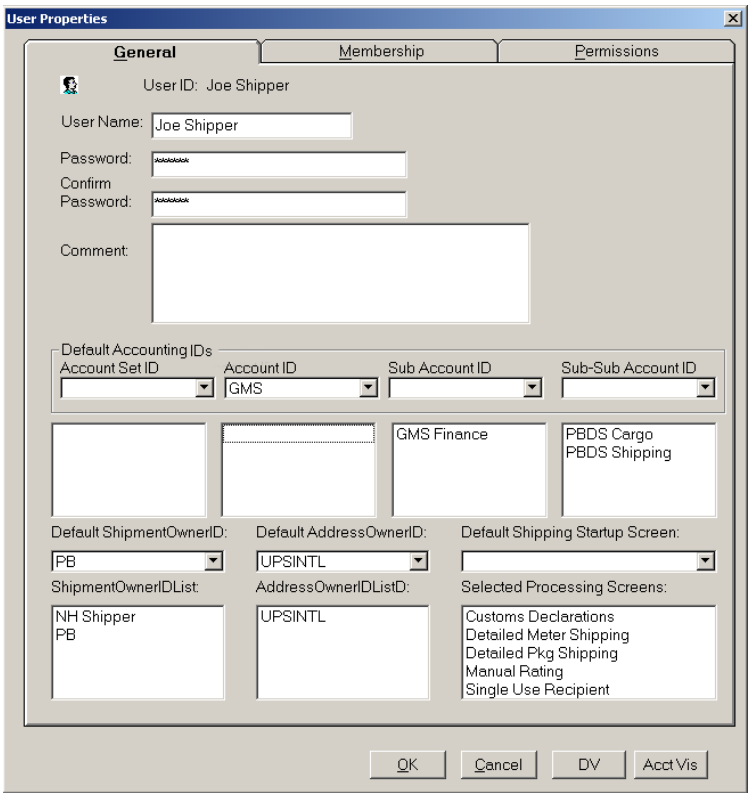
Editing the User Properties and Permissions

To display the User Properties dialog box:

1. Right-click on the user or group you just created.
2. Select **Properties**.

Setting the User's Defaults

On the **General** tab, you can edit the user's name, password, as well as what screens and defaults are assigned to the user.



1. (*optional*) Under **Default Accounting IDs**, select the user's default account settings to appear on shipping screens. See page 5-7 for more information on configuring Accounting Visibility.
   The boxes underneath the Default Accounting IDs display which accounting visibility groups the user can access.
2. (*optional*) Select a default Shipper for the user under the **Default ShipmentOwnerID** drop-down menu.

   IMPORTANT: To use the SendSuite Basic edition shipping templates, you *must* assign a **Default ShipmentOwnerID** for individual users (or groups). The Basic templates assume the user ships from the same location. The user does not have access to the**Shipper** field.
3. (*optional*) Select a default recipient for the user under the **Default AddressOwnerID** drop-down menu.
4. (*optional*) Select a default shipping screen for the user under the **Default Shipping Startup Screen** drop-down menu. This screen will appear automatically when the user logs in to SendSuite.

EXAMPLE: In the example to the right, the User has the following Account visibility options:

• The User can view all Account Set IDs.

• The User can view all Account IDs. The default on the shipping screen is **GMS**.

• The User can only view the Sub Account IDs that are in the **GMS Finance** Account Visibility Group.

• The User can only view the Sub-Sub Account IDs that are in the **PBDS Cargo** and **PBDS Shipping** Account Visibility Groups.

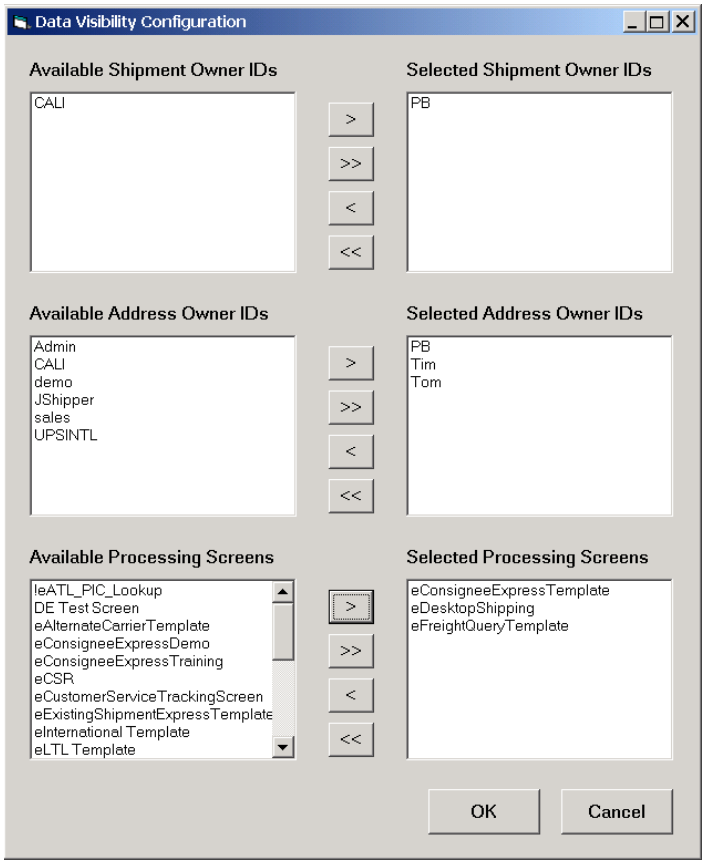
NOTE: By leaving any of the **Default** drop-downs blank, the user will have to select a screen or value for that field.

Configuring Groups and Users

Editing the User Properties and Permissions

User Data Visibility

1. Click **DV** to change which screens and field values are visible to the User or Group on the shipping screen.



- The Available Shipment Owner IDs field lists the available shippers stored in the system. The Selected Shipment Owner IDs field lists what shippers the user can ship with.
- The Available Address Owner IDs field lists the available addresses stored in the system. The Selected Address Owner IDs field lists what addresses the user can ship to.
- The Available Processing Screens field lists the available shipping screens stored in the system. The Selected Processing Screens field lists what shipping screens the user can access.

2. Move fields from an Available to Selected field using the [>] button.
   - Use the [>>] button to select *all* available fields.
   - Use the [<] and [<<] to remove (and remove all) selections.
3. Click **OK** when you are done.

NOTE: By leaving any of the **Selected** fields blank, the user can access all data for that selection.

For example, if you leave **Selected Processing Screens** blank, the user will be able to access every shipping screen available in SendSuite.

Configuring Groups and Users

Editing the User Properties and Permissions

NOTE: Enabling Account Visibility allows you to limit what accounts and account sets users can access on the shipping screens.

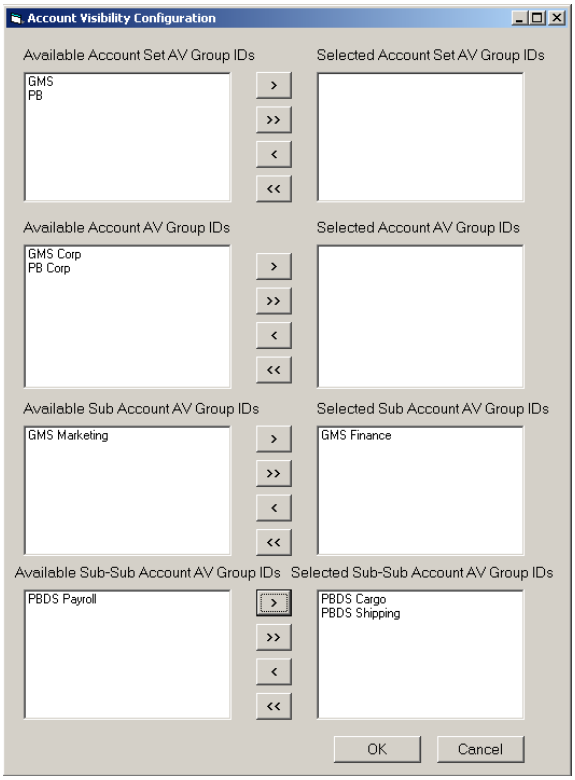
Account Visibility groups are configured in the thin-client. Refer to the thin-client's online help for more information on setting up Account Visibility groups.

NOTE: By leaving any of the **Selected** fields blank, the user can access all data for that selection.

For example, if you leave **Selected Account Set AV Group IDs** blank, the user will be able to access every account set group available in SendSuite.

Account Visibility

1. Click **Acct Vis** to change which accounts and account sets are visible to the User or Group on the shipping screen.



   - The Available Account Set AV Group IDs field lists the available account set groups stored in the system. The Selected Account Set AV Group IDs field lists what account set groups the user can access.
   - The Available Account AV Group IDs field lists the available account groups stored in the system. The Selected Account AV Group IDs field lists what account groups the user can access.
   - The Available Sub Account AV Group IDs field lists the available sub account sets stored in the system. The Selected Sub Account AV Group IDs field lists what sub account groups the user can access.
   - The Available Sub-Sub Account AV Group IDs field lists the available sub-sub account groups stored in the system. The Selected Sub-Sub Account AV Group IDs field lists what sub-sub account groups the user can access.
2. Move fields from an Available to Selected field using the [>] button.
   - Use the [>>] button to select *all* available fields.
   - Use the [<] and [<<] to remove (and remove all) selections.
3. Click **OK** when you are done.

Configuring Groups and Users

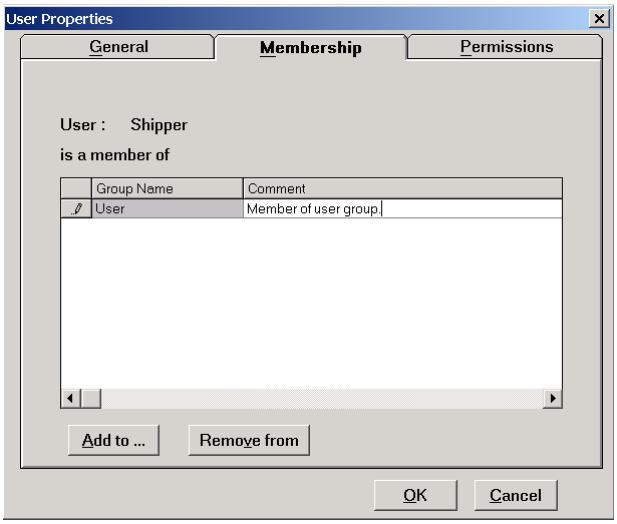
Editing the User Properties and Permissions

Adding a User to a Group

Groups eliminate the need to configure user rights individually.

To assign a User to a Group:

1. Click the **Membership** tab.
2. Click the **Add** button.
3. Select the group.
4. Click **Add**.



Configuring Groups and Users

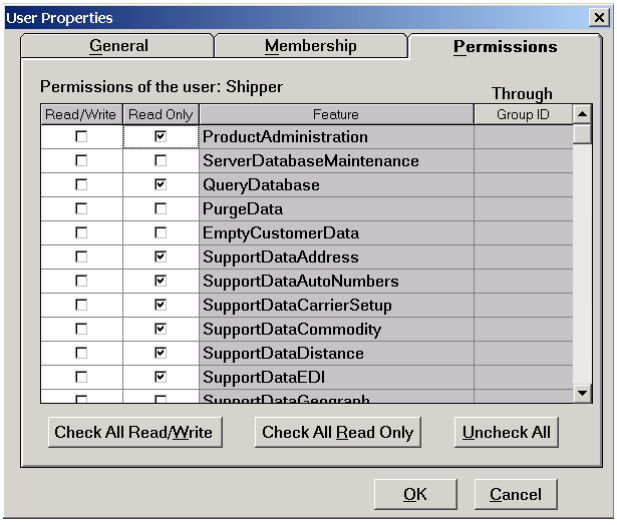
Editing the User Properties and Permissions

TIP: To quickly give the user read and write access to all features, click the **Check All Read/Write** button. See the security permissions table on the next several pages for descriptions of each security permission. (This is strongly discouraged, since most users should not have all the available rights.)

Assigning Individual User Rights

Use the following permissions to assign rights to the user, regardless of what group the user is a member of.

1. Click the **Permissions** tab.
2. Select the checkboxes to the left of the features to assign the individual's permissions.



3. Click **OK**.

NOTE: You can assign a user to a group and then give the user additional individual rights. However, a user cannot have fewer rights than the group. If a user must have fewer rights than the group, you must remove the user from the group. If you remove a user from a group, that user will have no rights until you assign individual rights or add the user to another group.

User Properties Dialog Box: Permissions Tab		
Feature	**Description**	**Applies To**
ProductAdministration	Allows you to have administrator permissions. You can access all modules and functions within SendSuite.	Admin
ServerDatabaseMaintenance	Allows you to start up and stop the SQL Server and the Server Agent from the SendSuite interface. Setting this permission in SendSuite does not affect permissions in SQL Server.	Admin
QueryDatabase	Allows you to look up any information in your SendSuite data files. For example, you can view all shipments that went to a particular customer on a given date. This feature is located in the Tools Module. The Query feature is always read-only, so it does not matter whether you check Read/Write or Read-Only.	Admin
PurgeData	Allows you to permanently delete data records from your SendSuite database tables. This feature is located in the Tools Module.	Admin
EmptyCustomerData	The following options allow you to empty customer data: ☐ **Customize** — select the tables from the SendSuite database that you want to empty ☐ **Empty** — select the tables to empty all customer data in the customized table list	Admin
SupportDataAddress	Allows you to specify all addresses needed on your packing and shipping documents, including those of your consignees and your own organization and carriers. This feature is located in the Supporting Data Module.	Admin
SupportDataAutoNumbers	Allows you to set up how SendSuite will generate automatic bill numbers, invoice numbers, and order numbers. This feature is located in the Supporting Data Module.	Admin
SupportDataCarrier Setup	Allows you to modify carrier profiles that were loaded during data loading. This feature is located in the Supporting Data Module.	Admin
SupportDataCommodity	Stores the commodity codes and freight classes. The Commodity Table provides a general description of the type of goods. This feature is located in the Supporting Data Module.	Admin
SupportDataDistance	Stores distance information for use with distance-based LTL and truckload shipping rates. This feature is located in the Supporting Data Module.	Admin

User Properties Dialog Box: Permissions Tab		
Feature	**Description**	**Applies To**
SupportDataGeograph	The Geograph table contains the geographic coordinates for all zip codes in the United States. The Distance window uses this information to calculate the distance-based rates. If you plan to use the distance-based rates to Canada and Mexico, you will need to manually enter the geographic coordinates here first. This feature is located in the Supporting Data Module.	Admin
SupportDataLabel Selection	Use the Label Selection window to assign how labels will be used. You can assign carrier, compliance, billing, and shipper labels. This feature is located in the Supporting Data Module.	Admin
SupportDataLabelSetup	Use the Label Setup window to define the content and purpose of labels in SendSuite. Use one of SendSuite's many label templates as the basis for labels. This feature is located in the Supporting Data Module.	Admin
SupportDataManifest Configuration	Use this feature to make required settings for carrier manifests. You can make different settings for each shipper. The Manifest Setup window consists of two tabs: ☐ **Configuration** tab—This tab contains a separate configuration tab for parcel carriers.	Admin
SupportDataManifest Configuration (cont.)	☐ **Manifest Numbers** tab—This tab allows you to set up sequence numbers for manifests. This feature is located in the Supporting Data Module.	Admin
SupportDataProduct	Allows you to set up and maintain your product database. This feature is located in the Supporting Data Module.	Admin
SupportDataProNumbers	Use this feature to set up the PRO number format and number range for each shipper/carrier combination. This feature is located in the Supporting Data Module.	Admin
SupportDataTariffSetup	Tariff Setup is where the rates and zones of the system actually reside. Logistics Services configures these tables and the data loading process populates the data into the SendSuite system. However, you may need to use these tables to enter programmable rates. This feature is located in the Supporting Data Module.	Admin
CustomizeReport	Use the Custom Report Interface window to create your own SendSuite Reports. This feature is located in the Reports Module.	Admin
ShipmentProcess Operation	Use Shipment Processing to rate shipments and generate carrier-approved shipping documents and labels. This feature is located on the Shipping Workstation.	Shipping

User Properties Dialog Box: Permissions Tab		
Feature	**Description**	**Applies To**
SetupShipmentProcessing	Use the Shipment Processing Setup to define processes, screen layouts, field defaults, and processing events for the Shipment Processing window. This feature is located in the Shipping Module.	Admin
EndOfDay	Allows you to access the End of Day menu category.	Admin
PlanningOperation	Allows access to the Shipment Planning menu category on the Shipping Workstation.	Shipping
SetupIntegration	Allows you to set up integration in various places within SendSuite. This feature is located in the Integration Module.	Admin
RunIntegration	Allows you to run integration, such as Data Mapper, ODBC, and Conditional Logic. This feature is located in the Integration Module.	Admin
DeleteShipment	Use the Shipments tab from the Purge Data window to delete shipments. This feature is located in the Tools Module.	Admin
SetupTaskScheduler	Allows the automated execution of defined tasks on a one-time, periodic, or continuous schedule. This feature is located in the Tools Module.	Admin
LaunchTaskScheduler	Launches the task scheduler option and begins processing tasks that you schedule. This feature is located in the Tools Module.	Admin
SetupSystem	Allows you to perform system setup functions.	Both
eTMSSupportingData	Allows you to enable/disable the Supporting Data icon on the thin client. Read Only is not supported for this function.	Shipping
eTMSShipmentProcessing	Allows you to enable/disable the Shipment Processing icon on the thin client. **Read Only** is not supported for this function.	Shipping
eTMSIntegration	Allows you to enable/disable the Integration icon on the thin client. **Read Only** is not supported for this function.	Shipping
eTMSeQuery	Allows you to enable/disable the eQuery icon on the thin client. **Read Only** is not supported for this function.	Shipping
eTMSDataAccount	Allows access to the sub-sub account data entry screen through the browser.	Shipping
eTMSDataAddress	Allows access to the address screen through the browser.	Shipping
eTMSDataShipperHandlingFees	Allows access to the shipper handling fees through the browser.	Shipping
eTMSDataCarrierAccounts	Allows access to the carrier account setup page through the browser.	Shipping

User Properties Dialog Box: Permissions Tab		
Feature	**Description**	**Applies To**
eTMSDataCommodity	Allows access to the commodity table through the browser.	Shipping
eTMSDataDepartment	Allows access to the sub-account setup through the browser.	Shipping
eTMSDataDivision	Allows access to the account setup through the browser.	Shipping
eTMSDataRemarks	Allows access to the remarks setup through the browser.	Shipping
eTMSDataBOLPreferences	Allows access to the Bill of Lading preferences through the browser.	Shipping
eTMSDataDownloads	Allows access to **Setup > Downloads** through the browser.	Shipping
eTMSDataCarrierAndLabels	Allows access to the Carrier and Labels tab.	Shipping
Extended Shipping Templates	Enables access to extended templates in the shipping screen setup and through the browser.	Shipping
Batch BOL	Allows user to run a batch of Bills of Lading through the interface.	Shipping
Meter Settings	Allows users access to the meter settings.	Shipping
eTMSPBLinks	Allows access to **Setup > Pitney Bowes Links** through the browser.	Shipping
eTMSPWDMaintenance	Allows access to **Setup > Password Maintenance** through the browser.	Shipping
eTMSReports	Allows access to the **Reports** menu through the browser.	Shipping
eTMSDeliveryInfo	Allows access to **Shipping > Delivery Information** through the browser. See *SVTS9146* for more information on the Delivery Information screen.	Shipping
eTMSCatalog	Allows access to **Shipping > Return Receipt Catalog** through the browser. See *SVTS9146* for more information on the Return Receipt Catalog screen.	Shipping
eTMSPkgAttributes	Allows access to **Setup > Data > Package Attributes** through the browser.	Shipping
eTMSAccountVisibility	Allows access to **Setup > Data > Accounting Visibility Groups** through the browser.	Shipping
eTMSMeterSetup	Allows access to **Setup > Data > Meter Setup** through the browser.	Shipping
eTMSAccountSets	Allows access to **Setup > Data > Account Sets** through the browser.	Shipping

Configuring Groups and Users

Security Permissions

Administrative Workstation Permissions

The following permissions apply to the Administrative Workstation and/or the Shipping Workstation.

Obsolete Permissions

The following permissions are obsolete:

Feature	Description
SupportDataEDI	Obsolete
EDIParameterSetup	Obsolete
EDIPartnerSetup	Obsolete
EDITranslator	Obsolete
EDITranslatorOverride	Obsolete
Setup Planning	Obsolete
SetupPickPack	Obsolete
SetupExport	Obsolete
OrderOperation	Obsolete
PackingOperation	Obsolete
StagePackageOperation	Obsolete
DeleteOrder	Obsolete
SetupPlanning	Obsolete

Configuring Groups and Users

Importing Users

You can import users into SendSuite into a group through a text file.

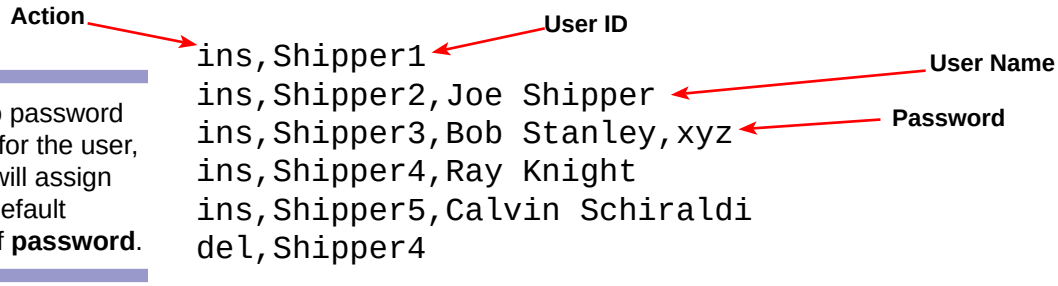
The Text File

The text file must be named **UserInfo.txt** and be in the following location:

C:\Program Files\PB Transcape\Conquest\Data Exchange

The text file must be comma-delimited, and use **ins** and **del** actions to insert and delete records on a single line. The action is followed by the Shipper ID, User Name, and the password for the user.

The text below is an example of a UserInfo.txt file:



NOTE: If no password is imported for the user, SendSuite will assign the user a default password of **password**.

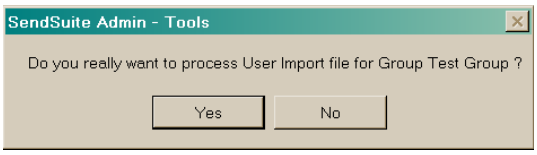
In this example, the Shipper4 entry is deleted, and not imported into SendSuite. Shipper1 has no User Name (this can be added later).

Importing Into SendSuite

1. Open the **Tools** module.
2. Click **Security > Users/Groups**.
3. Right-click an existing group.
   - Alternatively, create a new Group. See *Setting Up Groups*, page 5-2.
4. Click **Import Users**.



5. Click **Yes** at the prompt.



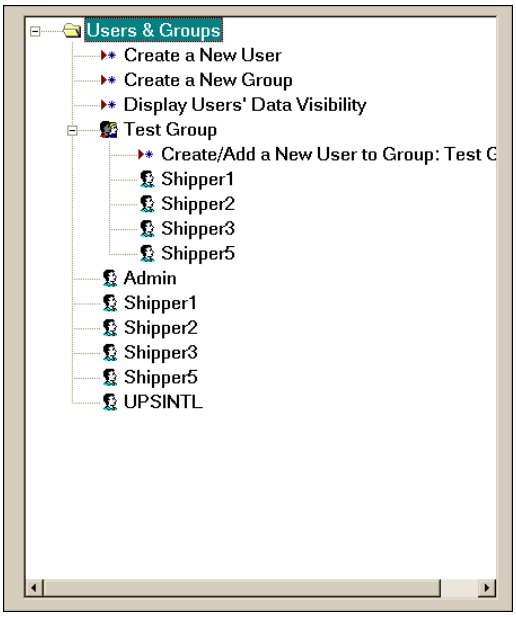
Configuring Groups and Users

Importing Users

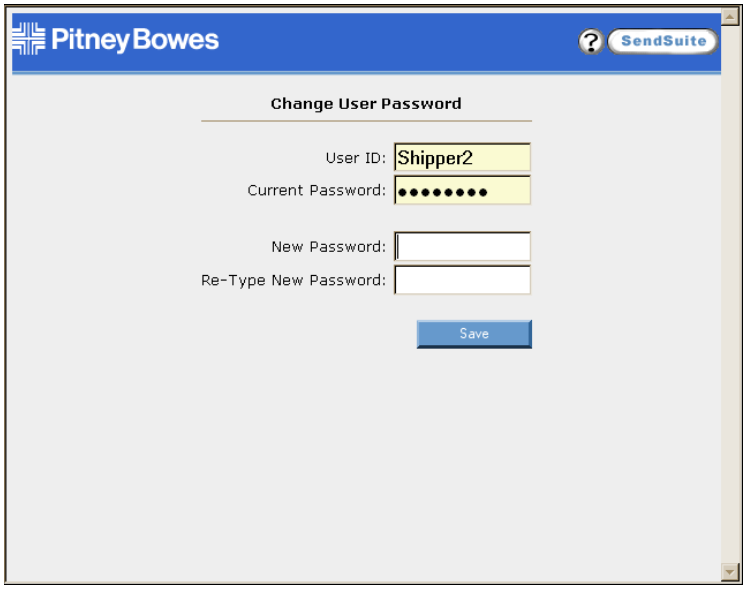
6. A prompt displays indicating a successful import. Click **OK**.



7. The Shipper IDs from your UserInfo.txt file now display under the selected Group.
   - You can now edit each individual user:
     - Right-click on a **Shipper ID** and click **Properties**.



8. Users with no assigned password will log in with **password**. SendSuite Shipping then prompts the user to type a new password.



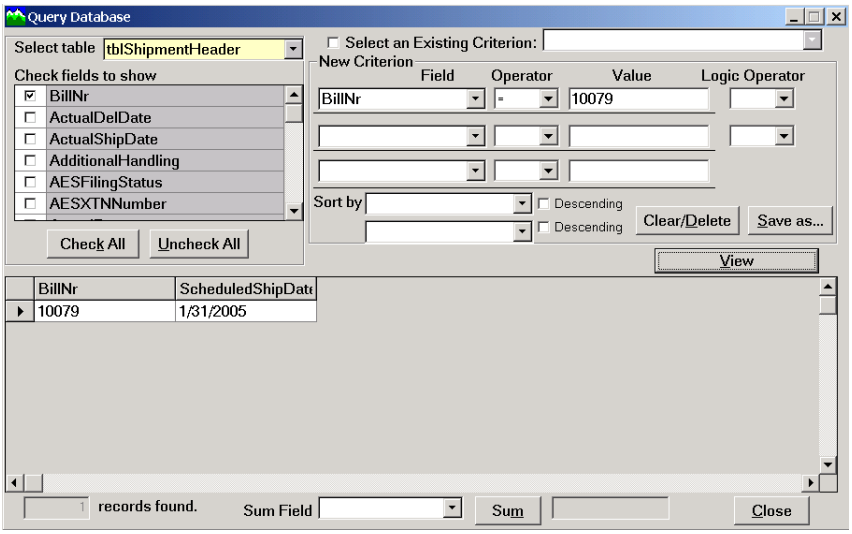
Simple Database Queries

Tools Module Simple Query

You can make simple SendSuite database queries from the Tools module.

To make a simple query of a SendSuite database from the Tools module:

1. Select **Query Database** from the **Database** menu.
2. Click the drop-down arrow in the **Select table** field.
3. Use one of the following methods to select the database fields listed in **Check fields to show** that you wish SendSuite to display:
   - Click the box to the left of the corresponding database fields you wish to display.
   - Click the **Check All** button.

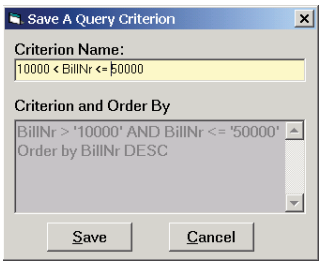


4. If you are defining a new query criterion, then:
   a. Click the drop-down arrow in the Field field.
   b. Select a field you wish to look up.
   c. Click the drop-down arrow in the Operator field.
   d. Select the appropriate operator.
   e. Type the value you wish to find in the Value field.
   f. Click the drop-down arrow in the Sort by field.
   g. Select the field you wish to have SendSuite use to sort the records it finds.
   h. If you want SendSuite to display the records in descending order, then select the checkbox to the left of Descending.

Simple Database Queries

Tools Module Simple Query

i. If you want SendSuite to save the query criterion you just defined, then click the **Save as** button.



j. Click the **View** button.

5. If you want to use a query criterion already saved in SendSuite, then:



a. Click the box to the left of **Select an Existing Criterion**.

b. Click the drop-down arrow in the **Select an Existing Criterion** field.

c. Select the saved query criterion you wish to use.

d. Click the **View** button.

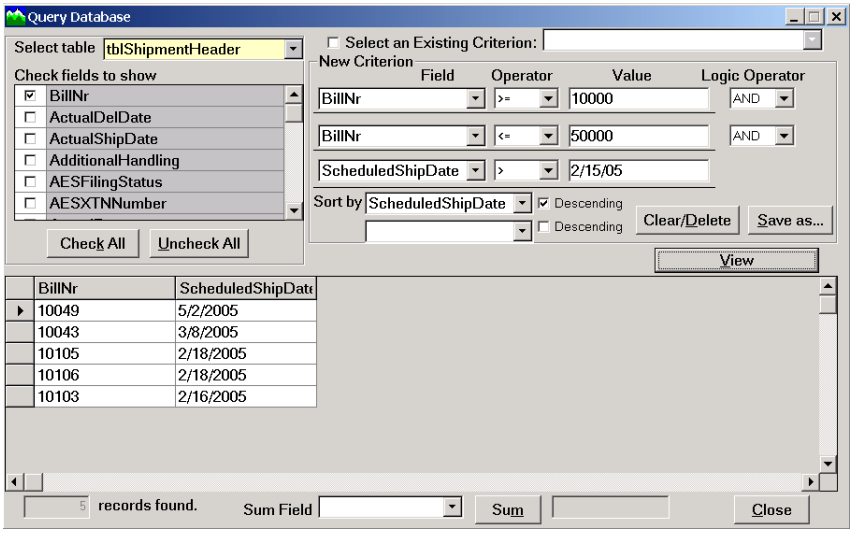
Advanced Database Queries

Tools Module Advanced Query

You can make advanced SendSuite Shipping database queries from the Tools module. Advanced database queries allow you to add a logic operator(s) to add additional query criteria.

To make an advanced query of a SendSuite database from the Tools module:

1. Select **Query Database** from the Database menu.
2. Click the drop-down arrow in the Select table field.
3. Use one of the following methods to select the database fields listed in **Check fields to show** that you wish SendSuite Shipping to display:
   - Click the box to the left of the corresponding database fields you wish to display.
   - Click the **Check All** button.
4. Click the drop-down arrow in the Field field.
5. Select a field you wish to look up.
6. Click the drop-down arrow in the Operator field.
7. Select the appropriate operator.
8. Type the value you wish to find in the Value field.
9. Repeat step 4 through step 8 until you have added all of the necessary query criteria.
10. Click the drop-down arrow in the Sort by field.
11. Select the field you wish to have SendSuite Shipping use to sort the records it finds.
12. If you want SendSuite Shipping to display the records in descending order, select the checkbox to the left of Descending.



13. If you want SendSuite Shipping to save the query criterion you just defined, click the **Save as** button.
14. Click the **View** button.

Task Scheduler

The Task Scheduler is a SendSuite Shipping feature that will perform a recurring function based on a schedule you set up.

There are three steps to setting up the Task Scheduler:

1. Create a task group.
2. Add tasks to the group.
3. Set up the schedule.

NOTE: Although multiple task schedules can be setup, only one task schedule can run at any given time throughout the enterprise.

In order to run the Task Scheduler, a Windows user must be logged on the computer, and a SendSuite Shipping user must be logged on to SendSuite Shipping. The Task Scheduler must be launched from the Tools module in SendSuite Shipping. If the Administrative Workstation is shut down and restarted, you must manually restart the Task Scheduler. See *Start the Task Scheduler* in the next section in this chapter.

Available Tasks

SendSuite Shipping can run the following operations from the Task Scheduler:

Feature	What it Does	Requirements
Airborne Auto Update (NOTE: Airborne is no longer supported and has been replaced by DHL.)	Uses FTP to data obtain updates from the carrier.	You must have an agreement with the carrier. The connection requires a username and password for the carrier's site.
Batch Email Notification	Runs a script specified in the task setup to send e-mail notification in a batch.	Screen configured with batch e-mail notification script assigned.
Carrier Service Description Branding	This task makes services available only if they are enabled for Shipper's account.	
Data Mapper	Runs a Data Mapper integration script. See *Data Mapper* in Chapter 8.	You must have a Data Mapper integration map set up.
Download Bulk POD Files	Downloads and processes Bulk POD data from USPS/PB Secure Archive.	
e-Track	Tracks shipments in a batch. See *E-Track* in Chapter 3.	The workstation running the task must have Internet (http) access.

Task Scheduler

Available Tasks

Feature	What it Does	Requirements
Empty Customer Data	Executes the Empty Customer Data feature, purging data from the database. See *Empty Customer Data* elsewhere in this chapter.	
End of Day Carrier Communication	This sends all manifests that have been queued in tblPBQueue. This task can run even when tblPBQueue is empty. That means that you can run it several times every day.	Depending on the carrier, the workstation running the task may need to communicate through port 443.
Get Package Status	Retrieves carrier package status information.	
Print Report	Prints a SendSuite report. See *Reports* in Chapter 4.	You must have a filter defined for the report. See *Creating and Saving Report Filters* in Chapter 4.
Print Small Package Manifest	Allows reprint of manifest for manifesting carriers.	
Process Downloaded Carrier Data	This processes carrier rate and route files for carriers such as DHL and Eastern Connection.	
Process Package Status	Processes carrier package status information.	
Purge Group/Loads/ Shipments	This feature deletes all the shipments that have the same GroupID.	The shipments must have a GroupID. See *Batch Rating* in Chapter 2.
Purge Shipment	Deletes shipments. You can specify criteria. For example, you can delete all shipments that are more than 60 days old.	You must set up criteria telling SendSuite which shipments to delete. See *Purge Shipments Setup* elsewhere in this Chapter.

Task Scheduler

Available Tasks

Feature	What it Does	Requirements
Purge Status	Deletes the status of packages that have been tracked. This task is best used with e-Track. For example, you track packages, print reports, then delete the shipment status so those packages do not print on the report again.	
Purge Time In Transit	Purges cached time in transit data stored in SendSuite Shipping.	
Remove Routes and Rates	This will undo the routing and rating on a group of shipments.	This shipments must have a common group ID as assigned by the Shipment Planning feature. See *Batch Rating* in Chapter 2.
Run a Batch or Executable File	This feature runs an external executable file on the schedule you set up. For example, you can run a batch file that moves a text file from one directory to another.	You must have the executable file set up.
Remove Temporary Data and Files	Removes data and carrier files (manifests, labels, etc.) stored by carrier component. These items are still available from SendSuite Shipping.	
Shipment Planning	Rates shipments in a batch.	The shipments must be saved in the database using a common group ID. See *Batch Rating* in Chapter 2.
Small Package Manifest	This task runs the small package manifest for the date and carrier selected. See *Small Package Manifest Setup* elsewhere in this Chapter.	The carrier manifest properties must be configured.

Task Scheduler

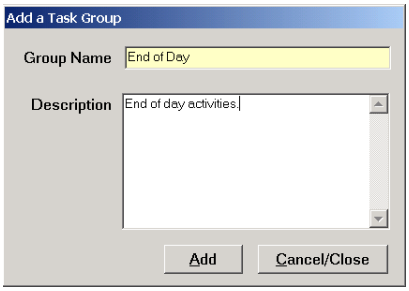
Available Tasks

Feature	What it Does	Requirements
Update Manifest Transmission Status	This task updates the manifest transmission status for DHL.	
UPS Auto Update	Download and update the SendSuite system from UPS site.	UPS communication must be enabled.

Create a Task Group

To create a task group:

1. Open the **Tools** module from the **Control Center**.
2. Select **Task Groups** from the TaskScheduler menu.
3. Click **Available Groups/Tasks**.
4. Double-click **Add a New Group**.



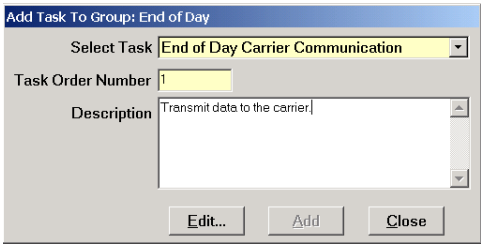
5. Type a unique name for the task group in the Group Name field.
6. Optionally, type a description for the task group in the Description field.
7. Click **Add**.
8. If necessary, enter other task groups.
9. Click **Cancel/Close** to close the window.

Task Scheduler

Add a Task to the Group

To add a task to the group:

1. In the Available Task Group window, click the task group you created.
2. Double-click **Add a Task to Group**.



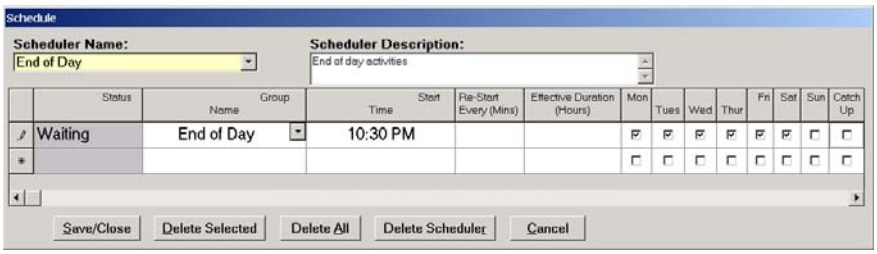
3. Click the drop-down arrow in the Select Task field to display the task drop-down list.
4. Select the task you want to add to this group.
5. Type the task's sequence number in the Task Order Number field. The sequence number specifies the order you want this task to occur in the task group.
6. Type a description of the task in the Description field.
7. Click **Edit** to complete the parameters for the specific task.
8. Click **OK**.
9. Click **Add** to add the task to the list.
10. If necessary, repeat step 2 through step 9 to add more tasks to the task list.
11. Close the **Available Task Groups** window.

Task Scheduler

Schedule When Task Groups Will Run

To schedule when task groups will run:

1. Select **Setup Schedulers** from the TaskScheduler menu.



2. Click the drop-down arrow in the Scheduler Name field and select the appropriate task scheduler.
3. Click the drop-down arrow in the Group Name field and select the appropriate group name. You can run more than one task group in a task schedule.
4. Complete each of the following for each task group:
   - **Start Time** — You can type in 12 hour or 24 hour format. For example, if you want a group to start at 10:30 every night, you can type “10:30 PM” or you can type “22:30”.
   - **Re-Start Every (Mins.)** — If the group needs to run more than once during the day, type the number of minutes between the times it launches. For example, if a group runs at 8:00 PM and you want to run it again at 10:00 PM, the type “120” in this field.
   - **Effective Duration (Hours)** — If you entered something in the Re-Start field, then you must indicate how many times the system should run that group. For example, if a group runs at 8:00 PM and you want to run it again at 10:00 PM and then stop, the type “2” in this field.
   - **Days (Mon.–Sun.)** — Check the days you want the group to run.
   - **Catch Up** — When you launch the Task Scheduler, it will wait until it reaches the Start Time to run the task group. For example, if you set up a group to run at 2:00 AM and launch the scheduler at 10:00 AM, it will wait until the next day to run that group.

     If you select this checkbox, the Task Scheduler will not wait to run a group. In the example above, it will run that group immediately.
5. Click **Save**.

NOTE: Make sure that the schedule does not conflict with any other process. For example, do not set the Task Scheduler to run when the database maintenance plan is running.

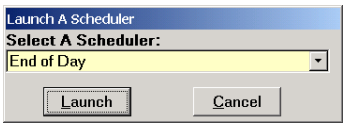
Task Scheduler

Tasks you schedule will not begin processing until you launch the task scheduler option.

Start the Task Scheduler

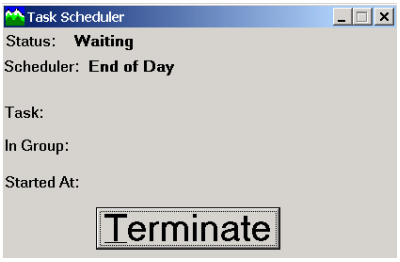
To start the Task Scheduler:

1. Select Launch a **Scheduler** from the TaskScheduler menu.



NOTE: If the Task Scheduler stops abnormally (e.g., someone unplugs the machine running it), you must follow these steps to restart the scheduler. The Task Scheduler does not automatically start when you restart the machine.

2. Click the drop-down arrow in the Launch a Scheduler field and select the task to be launched.
3. Click **Launch**.
4. Leave Task Scheduler open and minimize the Tools module. The tasks will continue to run until you stop the scheduler.
5. If you want to stop the scheduler, click **Terminate**.



6. To restart the Task Scheduler, follow the steps above.

Modifying a Scheduler

You can create new task groups, add tasks to existing groups, and change the schedule on which the scheduler runs by following the instructions on the previous pages.

Note that once you create a task, you cannot modify it. If you want to modify the properties of a task or change the order in which tasks run, you must delete them and re-add them to the task group.

If you modify anything, it is important to stop the scheduler and restart it for the changes to take place.

Task Scheduler

Terminating the Task Scheduler

To terminate the Task Scheduler:

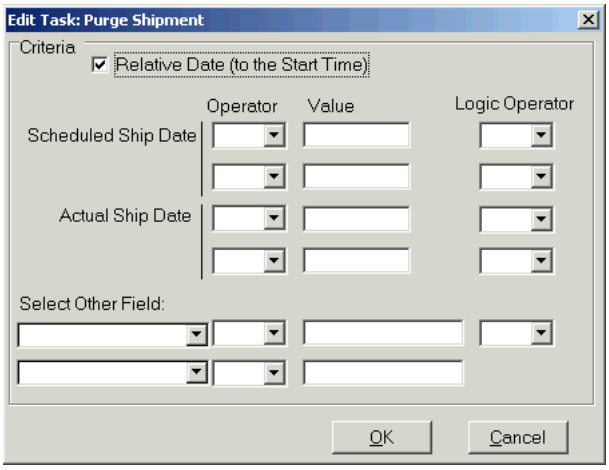
1. Open the **Tools** module from the Control Center.
2. Identify the scheduler that is running.
3. Click the **Terminate** button.
4. Click **Yes** to confirm that you want to stop the scheduler.

Setting Up Purge Shipment

If you are using the Purge Shipment task, you must tell the system which shipments to delete.

To set up shipment purge:

1. Follow the steps earlier in this chapter to create and add the task to the group.
2. Select the **Purge Shipment** feature.
3. Click the **Edit** button.



4. Use any of the fields to select the shipments.
5. If you want to purge shipments by date, you can use a relative date.
   a. Make sure the **Relative Date** checkbox is selected.
   b. Select an Operator. For example, if you want to delete all shipments that are over 60 days old, select **<=** or **<** operator.
   c. Type the number of days in the Value field. For example, if you want to delete all shipments that are over 60 days old, type **60** in this field.
6. Click **OK**.

Task Scheduler

Small Package Manifest Setup

This task runs the end of day manifest for the date and carrier you select. This task can be used as a forced close, automatically manifesting all shipments for a particular day.

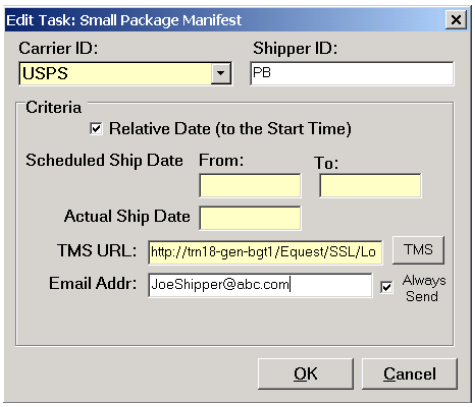
While the task prepares the manifest and places the electronic document in the queue for transmission, it does not print any of the documents. The manifest documents can be printed from the **End of Day - Small Package Reprint** feature on the Shipping Workstation.

If you want to transmit the manifest the same day that it was prepared, then you will want to include the **End of Day Carrier Communication** task in the same group with the **Small Package Manifest** task. Make sure that the Carrier Communication task is ordered to follow the Manifest task.

To set up small package manifesting:

1. Follow the steps earlier in this chapter to create and add the task to the group.
2. Select the **Small Package Manifest** feature.
3. Click the **Edit** button.

NOTE: Due to how some of the carriers are configured, you may need to set up multiple tasks to make sure you have manifested for all services.



4. From the Carrier ID drop-down, select the carrier/service/shipper combination.
5. Make sure the **Relative Date** checkbox is selected.
6. In the Scheduled Ship Date fields and Actual Ship Date field, type a zero (**0**). This will manifest for the current day.
   - If you want to run this process after midnight (therefore it is the next day), then type a negative-one (-1) in this field.
7. Click the **SendSuite** button to populate the SendSuite URL field.
   - If you are using multiple application servers, then manually type the Web address for the main application server in this field.
8. (*optional*) Type an email address to send a notice once communication is completed.
9. Click **OK**.

NOTE: Always Send causes an email notification to be sent with every communication attempt. If the system makes repeated attempts multiple emails will be generated. Select only during troubleshooting.

Task Scheduler

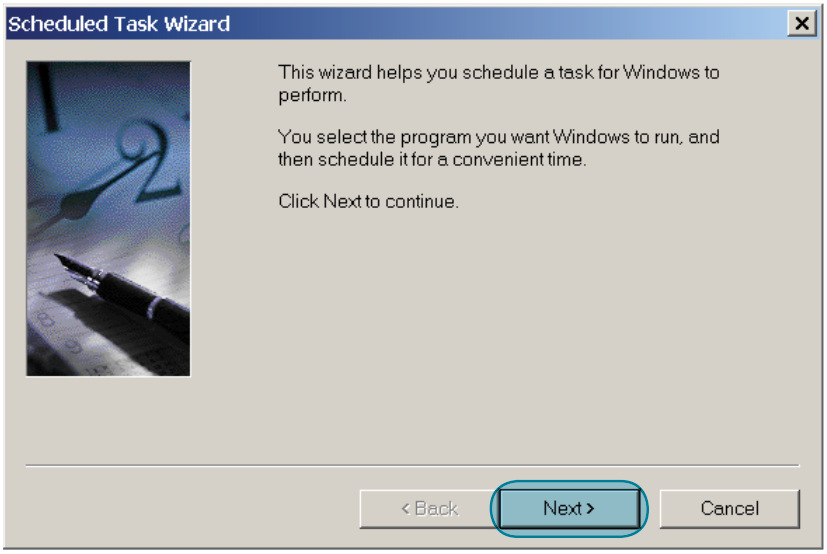
You can run scheduled tasks in SendSuite from the Windows Task Scheduler. Use the instructions below to configure the Windows Task Scheduler.

Running Tasks From Windows Task Scheduler

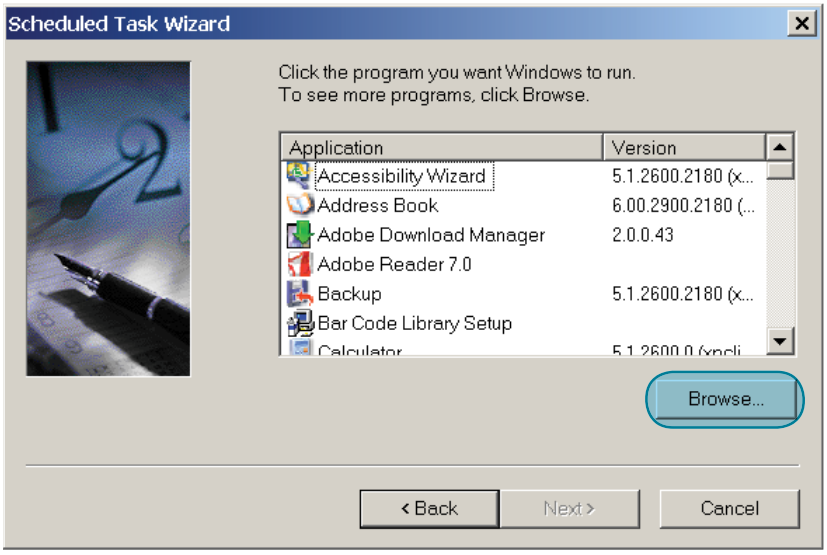
Creating the Windows Task

To create the Windows task:

1. Create a *Task Group*. (See elsewhere in this chapter.)
2. Click **Start** > **Settings** > **Control Panel**.
3. Double-click **Scheduled Tasks**.
4. Double-click **Add Scheduled Tasks**.
5. Click **Next**.


Scheduled Task Wizard
This wizard helps you schedule a task for Windows to perform.
You select the program you want Windows to run, and then schedule it for a convenient time.
Click Next to continue.
< Back
Next >
Cancel

6. Click **Browse** to find the SendSuite Shipping task scheduler.

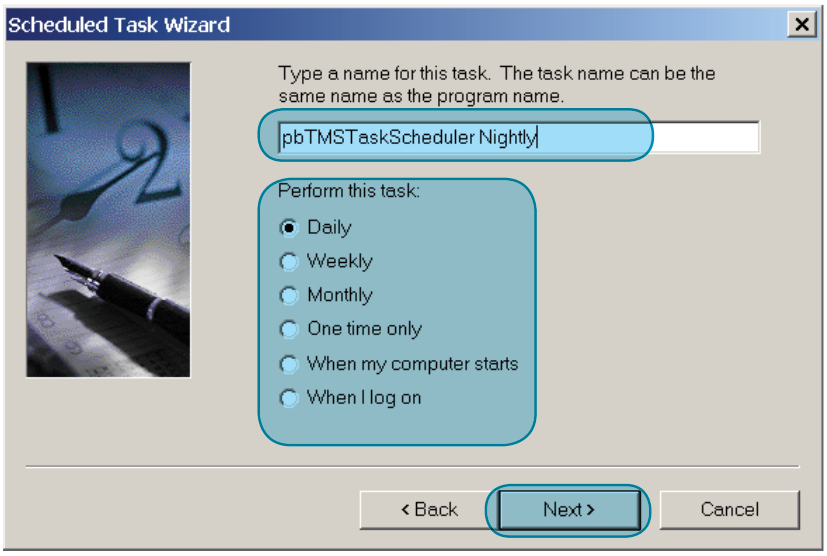


7. Navigate to: C:\Program Files\Pitney Bowes\SendSuite Shipping.
   - Legacy users should navigate to: C:\Program Files\PBTranscape\Conquest.

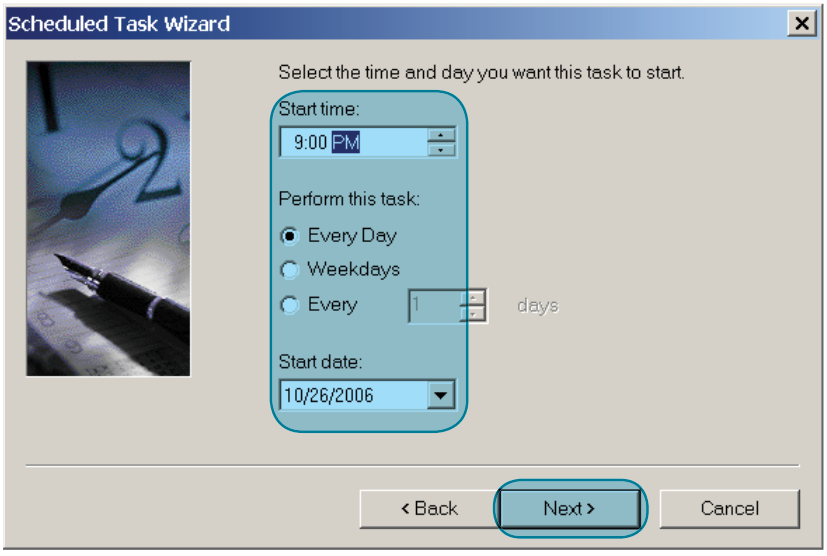
Task Scheduler

Running Tasks From Windows Task Scheduler

8. Select **pbTMSTaskScheduler.exe**.
9. Click **Open**.
10. Add the name of the group to the name of the scheduled task. For example: **pbTMSTaskScheduler Nightly**.



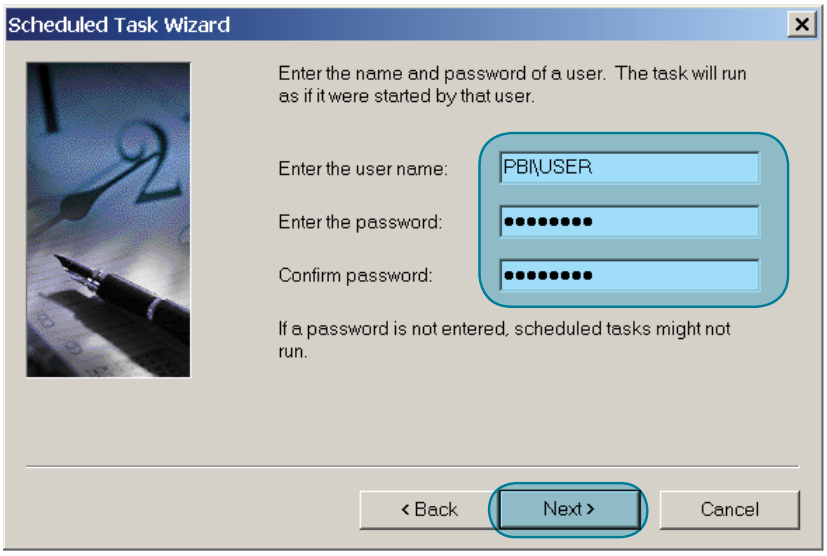
11. Select how often the task should run: **Daily**, **Weekly**, **Monthly**, etc., then click **Next**.
12. Set the **Start time** and **Start date** for the task, and indicate whether it should run **Every Day**, on **Weekdays**, or on another schedule.
13. Click **Next**.



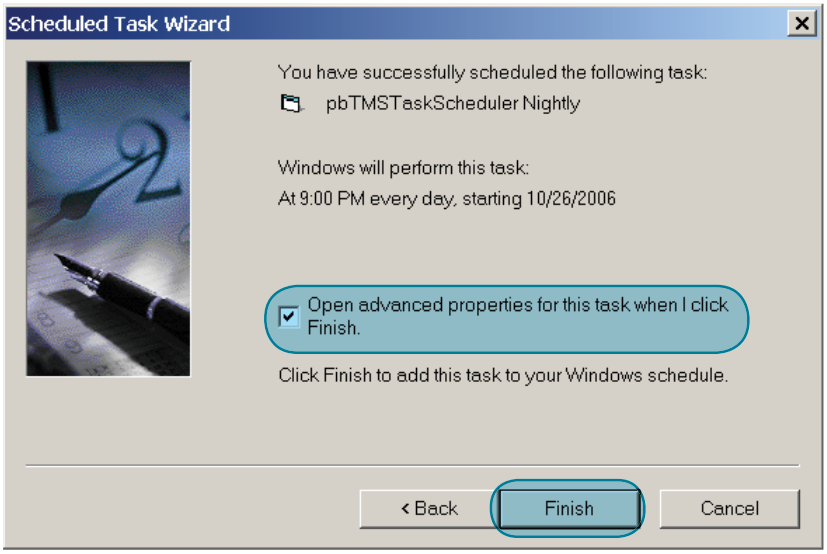
Task Scheduler

Running Tasks From Windows Task Scheduler

14. Enter a user name and password, confirm the password, then click **Next**.


Scheduled Task Wizard
Enter the name and password of a user. The task will run as if it were started by that user.
Enter the user name:
PBI\USER
Enter the password:
Confirm password:
If a password is not entered, scheduled tasks might not run.
< Back
Next >
Cancel

15. Select **Open advanced properties for this task when I click Finish**.


Scheduled Task Wizard
You have successfully scheduled the following task:
pbTMSTaskScheduler Nightly
Windows will perform this task:
At 9:00 PM every day, starting 10/26/2006
Open advanced properties for this task when I click Finish.
Click Finish to add this task to your Windows schedule.
< Back
Finish
Cancel

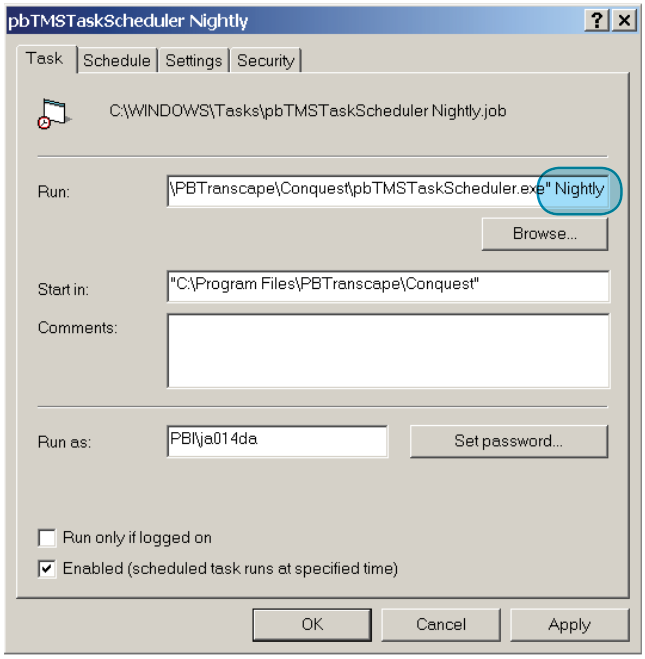
16. Click **Finish**.

Task Scheduler

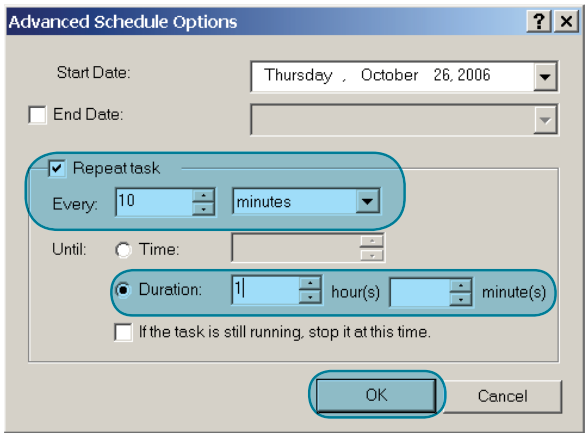
Running Tasks From Windows Task Scheduler

17. Type the name of the task group in the **Run** box *after* the final quotation mark. For example:
“C:\Program Files\Pitney Bowes\SendSuite Shipping\pbTMSTaskScheduler.exe” **Nightly**

> **NOTE:** If the name of the task group contains spaces, the name must also be enclosed in double quotes. For example:
> “C:\Program Files\Pitney Bowes\SendSuite Shipping\pbTMSTaskScheduler.exe” “End Of Day”



18. If you need the task to run more than once per day, click the **Schedule** tab.
    a. Click **Advanced**.



    b. Select **Repeat Task**.
    c. Set the frequency of repetition. For example, every 10 minutes.

Task Scheduler

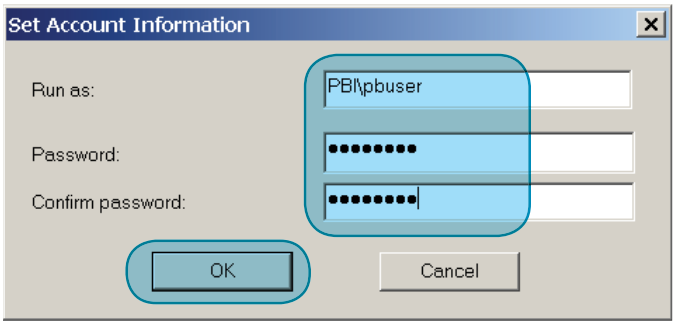
Running Tasks From Windows Task Scheduler

d. Set the duration of repetition, or indicate a stop time by selecting the **Until** option button.

e. Click **OK**.

19. Click **OK**.

20. Type and confirm the password, and click **OK**.



Testing the Task

To test the task:

1. Right-click on the task you just created, and select **Run**.
2. Check the Status column to verify that it displays as *Running*.
3. After the task completes, click the Last Run Time and Status columns. If the Status column displays *Could not start* the task failed. Open the properties of the task, and the properties of the task group to determine what might have caused the task to fail. See the Notes below for additional tips.

> **NOTES:** The Windows Task Scheduler can run tasks concurrently, and without a user being logged into the system. The user you supply for the task MUST be a member of the Administrators group and no other, or some tasks in the group may not run.

Purging Database Records

Purge Feature

You can permanently delete records from your database files by instructing SendSuite to purge its records.

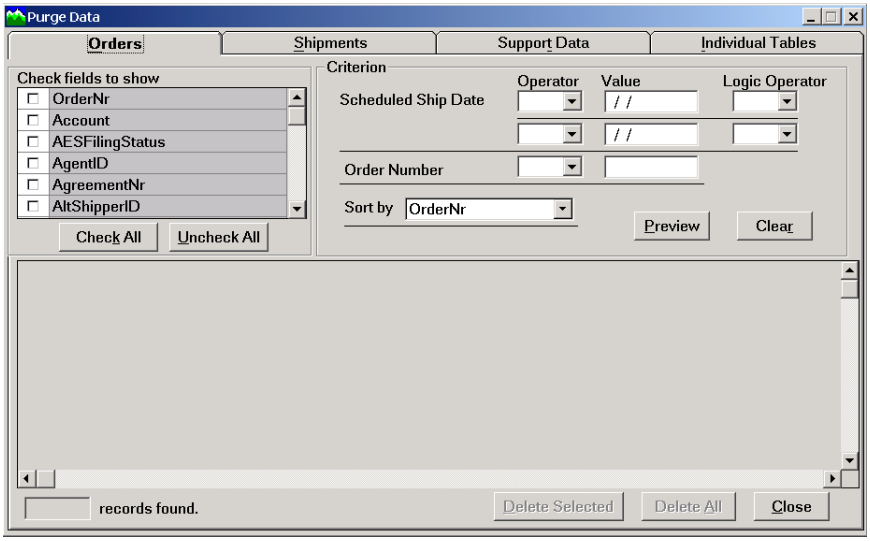
NOTE: Once records have been purged, they cannot be restored without restoring the entire database.

You can schedule a purge by using the Task Scheduler.

Use the purge feature to select the data that you want to delete from the database. You will input criteria that will display specific records to delete.

To use the purge feature:

1. From the Control Center, open the **Tools** module.
2. Select **Purge Data** from the Database menu.



3. Click one of the following tabs:
   - Orders — to delete orders
   - Shipments — to delete shipments
   - Support Data — to delete records from the Supporting Data Module
   - Individual Tables — to select from all the databases in the system
4. If you selected **Support Data** or **Individual Tables** tab:
   a. Click the drop-down arrow in the Select table field.
   b. Select the appropriate table.
   c. Click the drop-down arrow in the Field field.
5. Select a field you wish to use to look up records that will be purged.
6. Click the drop-down arrow in the Operator field.
7. Select the appropriate operator.

Purging Database Records

Purge Feature

8. Select the appropriate value by typing the value you wish to find in the Value field.
9. Add additional criteria to locate records, if necessary. To add additional criteria:
   a. Click the drop-down arrow in the Logic Operator field.
   b. Select the appropriate logic operator.
   c. Repeat Step 5 through Step 9.
10. Click the drop-down arrow in the Sort by field.
11. Select the field you wish to have SendSuite use to sort the records it finds.
12. Click the **Preview** button.
13. If you want to purge all the records displayed, click the **Delete All** button.
14. If you want to purge only selected records:
    a. Click in the gray area to the left of the displayed record to highlight the record you want to delete.
    b. Click the **Delete Selected** button.

NOTE: To select multiple records, you must press and hold the **C** key while you click on the gray areas to the left of the records you want to delete. If you want to select a group of sequential records, click the gray area to the left of the first record, press and hold the **S** key, and then click the gray area to the left of the last record.

Purging Database Records

Empty Customer Data

NOTE: This type of purge is not recommended because all data will be deleted. Some tables contain very important information that you must keep. For example, tblAddress contains records for carriers and your shipper ID. Using this feature, you would delete carrier information that is necessary to rate shipments.

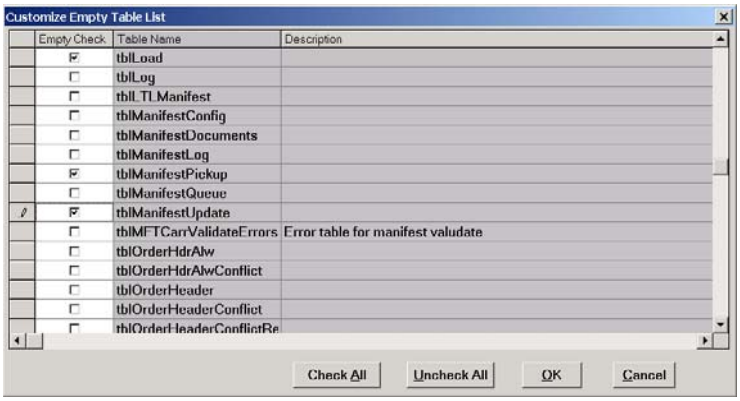
This feature allows you to specify the tables you want to purge. Unlike the purge feature, this feature will delete ***all*** the data on a table.

When using this feature, you first define the tables that will be emptied, then you execute the data purge.

Customize

To define the tables you want to empty:

1. From the Control Center, open the **Tools** module.
2. From the **Database** menu, select **Empty Customer Data** > **Customize**.



3. Check the tables you want to empty when you execute this feature.
4. Click **OK**.

Empty Tables

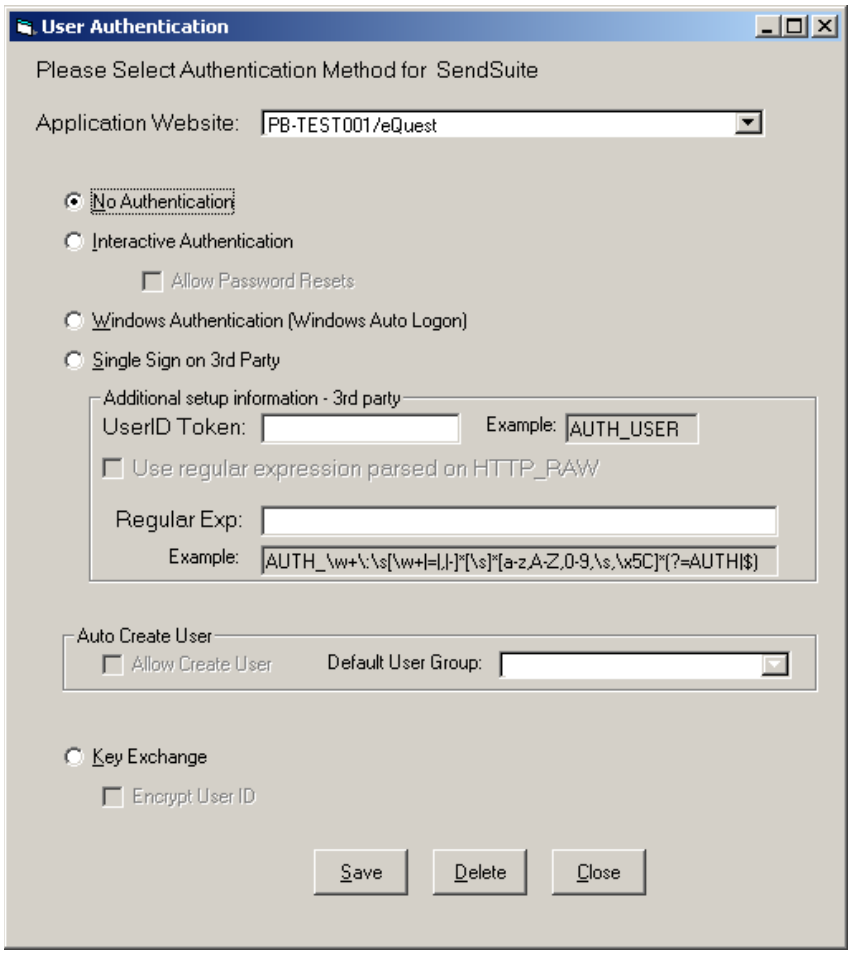
After you have defined what tables to empty, follow these instructions to execute this feature:

1. From the Control Center, open the **Tools** module.
2. From the Database menu, select **Empty Customer Data**.
3. Select **Empty**.
4. PB SendSuite asks you if you are sure you want to do this. Click **Yes** to empty the data.

NOTE: All data in the tables you selected will be deleted. The system does not discriminate based on date, type of data, etc.

User Authentication

The User Authentication screens allows you to setup the authentication method when logging into the SendSuite Shipping thin-client.



There are five authentication methods in SendSuite Shipping:

- **No Authentication** — Anyone who launches the thin-client will run under the built in ADMIN user and will not be prompted for user ID and password.
- **Interactive Authentication** — SendSuite presents a login page to prompt for the user ID and password. The user ID and password are verified against SendSuite database.

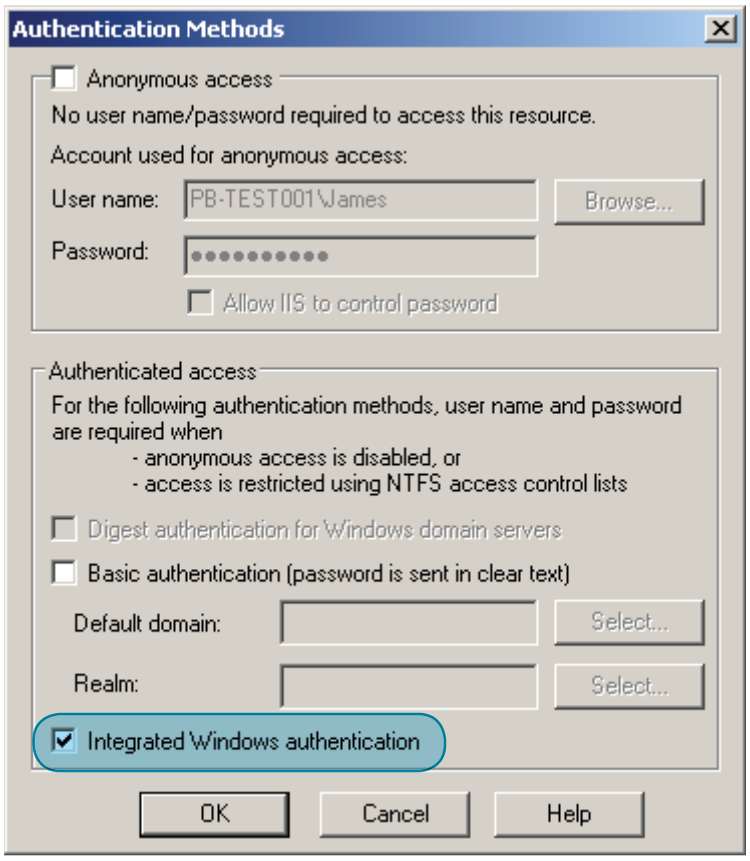
User Authentication

- **Windows Authentication** — The application will verify the Windows user ID passed in exists in the SendSuite Database. Since the user is authenticated through Windows, no password is validated by SendSuite Shipping.

  You must enable Windows security before enabling Windows Authentication in SendSuite Shipping.

  To enable Windows security:

  1. Click Start **> Settings > Control Panel**.
  2. Double-click **Administrative Tools**.
  3. Double-click **Internet Information Services**.
  4. Open **(local computer) > Web Sites > Default Web Site**.
  5. Right-click **eQuest** and select **Properties**.
  6. Click the **Directory Security** tab.
  7. Click **Edit…**.
  8. Select **Integrated Windows authentication**.
  9. Click **OK** and close **Internet Information Services**.



User Authentication

- **Single Sign on 3rd Party** — A third party authentication provider sits between or the client browser and the thin-client.

  The third party single sign on provider authenticates the user and then passes the authenticated user to the application. SendSuite Shipping verifies user credentials from the third party provider against the SendSuite Database.
- **Key Exchange** — This authentication option is used when Pitney Bowes provides hosting services or when SendSuite Shipping is behind the customer's firewall. User ids/profiles must be established on SendSuite Shipping for each user.

  SendSuite Shipping generates a client key for each software instance, and encrypts and stores the key. Each customer is provided with their key to store and use securely.

NOTE: Call technical support for assistance with configuring **Single Sign on 3rd Party or Key Exchange.**

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6 Tariffs

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Creating a Custom Parcel Tariff from Scratch

To create a custom parcel tariff from scratch, you must complete the following tasks:

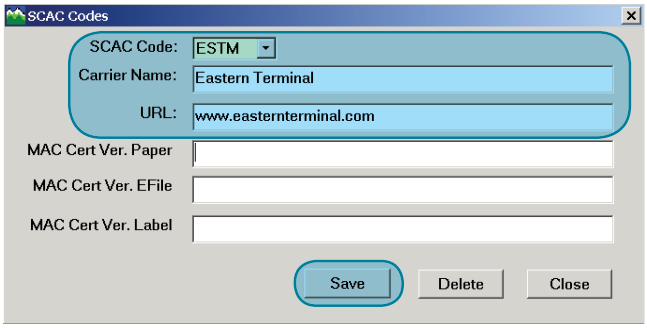
1. Enter the carrier's SCAC code.
2. Create an address record for the carrier.
3. Create the carrier's tariff for each level of service the carrier provides.
4. Set up the carrier profile.
5. Define any additional parameters, such as discounts, etc.
6. Apply the carrier's new tariff(s) to the shipper(s) who will use the tariff.

Once you have analyzed the carrier's rate structure and entered the required data, you must also test the tariff to be certain that it rates shipments correctly.

SCAC Code

To enter the SCAC code:

1. Open the **Supporting Data** module from the Control Center.
2. Open the **Carrier & Labels** folder.
3. Open the **SCAC Codes** table.



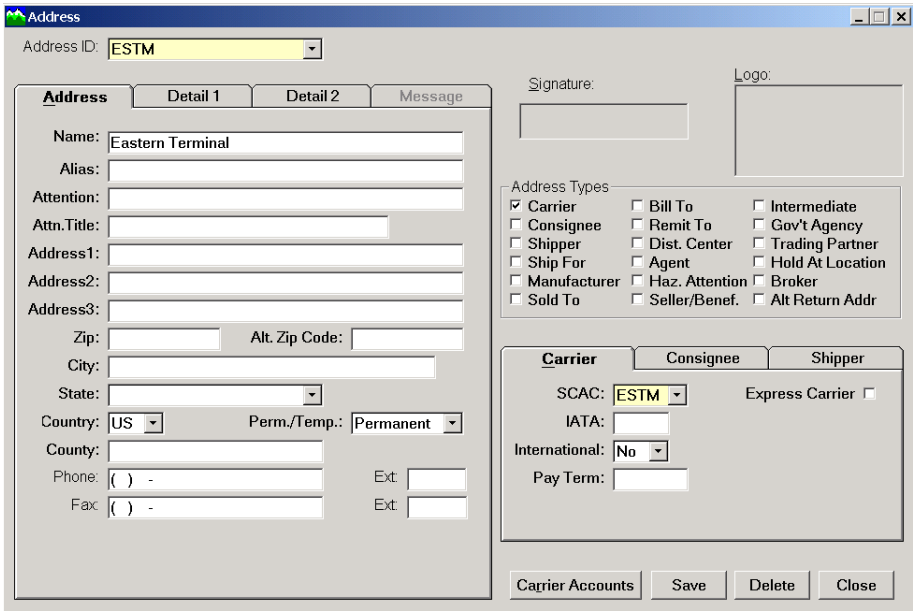
4. Click the blank button to make a new record. 
5. Type a three to four letter code for the carrier in all caps in the SCAC Code field.
6. Type the carrier's name in the Carrier Name field.
7. (Optional) Type the carrier's URL in the URL field. (MAC Certification information is not required for custom tariffs.)
8. Click **Save**, then click **Close**.
9. Close the **Carrier & Labels** folder.

Creating a Custom Parcel Tariff from Scratch

Address Record

To create an address record for the carrier:

1. Open the **Supporting Data** module from the Control Center.
2. Open the **Data** folder.
3. Open the **Address** table.
4. Click the blank button to make a new record.



5. Type the new carrier's SCAC code in the Address ID field.
6. Type the new carrier's name in the Name field.
7. Select the **Carrier** checkbox.
8. Type the new carrier's SCAC Code in the **SCAC Co**de field on the Carrier tab.
9. Does the new carrier have an IATA code? If it does, then type the two to three letter IATA code in the IATA field. If not, leave that field blank.
10. Does the carrier carry international shipments? If so, select **Yes** in the International field. If not, select **No** in that field.
11. Does the carrier have payment terms? If so, type the number of the carrier's payment terms (for example, 10 days or 30 days) in the Pay Term field. If not, leave the field blank.
12. Select **Express Carrier** if this carrier considers itself 'express'.
13. Click **Save**, then click **Close**.
14. Close the **Data** folder.

Creating a Custom Parcel Tariff from Scratch

Tariff Setup

To set up a carrier's tariff:

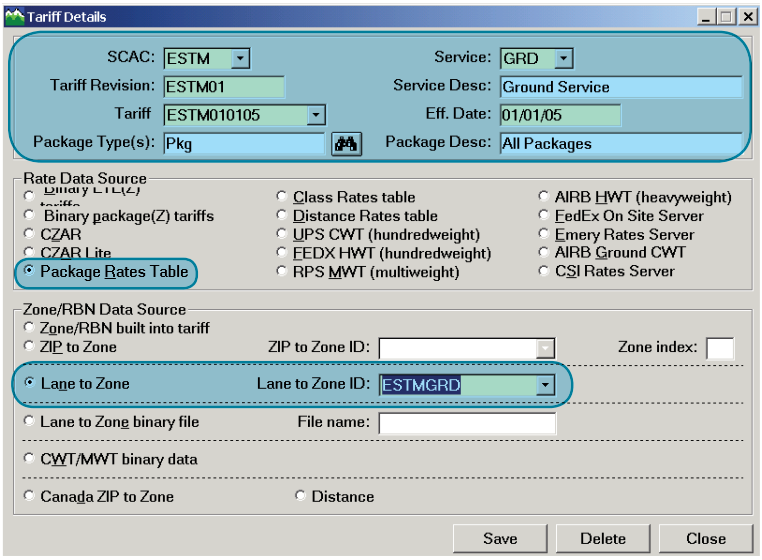
1. Open the **Supporting Data** module from the Control Center.
2. Open the **Carrier & Labels** folder.
3. Open the **Rates** folder.
4. Double-click **Tariff Setup** to display the Tariff Setup window.
5. Complete the instructions in the sections that follow to enter the correct data on the following tabs:
   - Tariff Header tab
   - Zone/RBN tab
   - Rates tab

NOTE: From this point on, we will refer to the line marked with a ***** as the "New Record" line.

Tariff Header Tab

Under the Tariff Header tab of the Tariff Setup window:

1. Scroll to the bottom of the list of tariffs in the Tariff Header tab. Click anywhere in the last empty line, which is marked with a * in the far left gray column.
2. Click the **Details** button.



NOTE: Pitney Bowes recommends that you use the carrier's SCAC code followed by a number for the tariff revision. For example, if Joe's Delivery's SCAC is JOES, then type JOES01 as the Tariff Revision ID.

3. Type the carrier's SCAC code in the SCAC field and press **Tab**.
4. Create a unique Tariff Revision ID and type it in the Tariff Revision field and press **Tab**. When you press **Tab**, SendSuite® Shipping automatically fills in the Tariff ID.

NOTE: If the carrier provides multiple services, you must set up a separate tariff for each service.

5. Select or type the appropriate level of service for this tariff in the Service field and press **Tab**.
6. (Optional) Type a description of the service in the Service Desc field.

Creating a Custom Parcel Tariff from Scratch

Tariff Setup

NOTE: You must type the date as MM/DD/YY.

NOTE: Pitney Bowes recommends that if you are creating a new Lane to Zone ID that you base the name on the SCAC and the service. For example, Joe's Delivery's Lane to Zone ID for ground service might be JOESGRD.

7. Type the date the tariff took effect in the Eff. Date field.
8. (Optional) Click the binoculars button and select the package type that this tariff supports.
9. Select **Package Rates Table**. Package rates are used to create parcel tariffs that rate based upon a weight applied to each package.
10. Select **Lane to Zone**.
11. Select or type a **Lane to Zone ID**:
    - If the carrier bases its rates on the same lane to zone that another carrier uses, then you can select the other carrier's Lane to Zone ID from the drop-down list.
    - If the carrier bases its rates on a lane to zone that is not already loaded into SendSuite, then you must create a new Lane to Zone ID and type it in the Lane to Zone ID field.
12. Click **Save**, then click **Close**.

Zone/RBN Tab

You establish all the zones that a carrier delivers to when you complete the Zone/RBN tab. If a carrier delivers to a number of zones, then you will create multiple lines on the Zone/RBN tab. Repeat the steps listed below for each Zone/RBN that the carrier supports.

NOTE: A Zone/RBN (Rate Base Number) is an identifier for range of areas. For example a carrier may charge $5 for every zip code from Minneapolis (55420) to Chicago (60609). The carrier may also specify that every zip code from Minneapolis to Chicago has a Zone/RBN of 12345. By assigning a Zone/RBN, the charge does not have to be entered for every zip code between Minneapolis and Chicago.

In the Tariff Setup window:

1. Click the **Zone/RBN** tab.
2. Click in the **New Record** line.
3. Click the **Details** button.
4. Type or select the two-letter ISO country code in the **Country** field (for example, US).
5. Enter the data necessary for rating, depending on the way the carrier determines its rates. You must select one of the following methods and complete the instructions in that section to correctly enter the Lane to Zone data:
    - State
    - City and State
    - ZIP Code

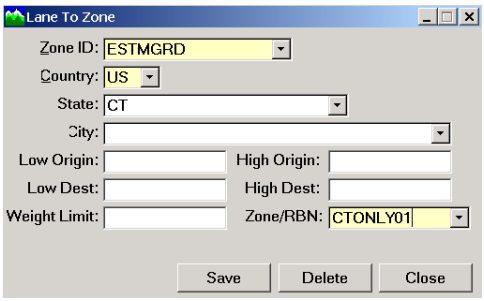
Creating a Custom Parcel Tariff from Scratch

Tariff Setup

NOTE: The Zone/RBN can be an alpha, numerical, or alpha/numerical value. If you make the Zone/RBN an alpha or alpha/numerical value, then the value can be any length. Numbers less than 8 digits long will be padded with leading zeros.

State

If the carrier's origin point and destination points are always within a certain state, you can use the state option. This means you create a tariff that will only apply to consignees within the state you indicate in the State field.



a. Type or select the two-letter state code in the State field.

b. Create a Zone/RBN code and type it in the Zone/RBN field.

c. Click **Save**, then click **Close**.

Creating a Custom Parcel Tariff from Scratch

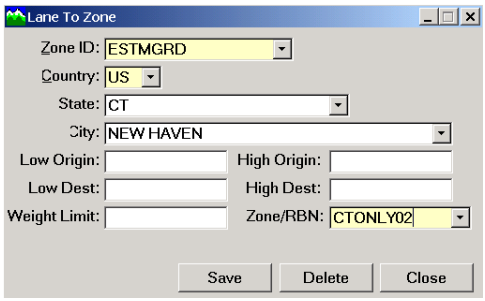
Tariff Setup

NOTE: You must always spell the city the same way SendSuite spells the name of the city in the Geograph table. SendSuite will not recognize any variations of the spellings of city names.

NOTE: Pitney Bowes recommends that you click the drop-down arrow in the field and select the city name from the list to assure that you have the spelling that SendSuite recognizes.

City and State

If the carrier's origin and destination points are always within a certain city and state, then you can use the city and state option. This means that you create a tariff that will only apply to consignees within the city and state that you indicate.



a. Type or select the two-letter state code in the **State** field.

b. Type or select the name of the city in the **City** field.

c. Create a Zone/RBN code and type it in the **Zone/RBN** field.

> **NOTE:** The Zone/RBN can be an alpha, numerical, or alpha/numerical value. If you make the Zone/RBN an alpha or alpha/numerical value, then the value can be any length. However, if you make the value strictly numerical, it must be eight digits long.

d. Click **Save**, then click **Close**.

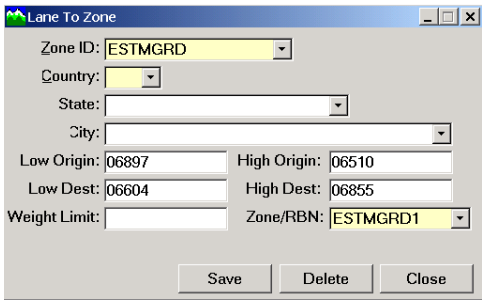
Creating a Custom Parcel Tariff from Scratch

Tariff Setup

ZIP Code

If the carrier's origin and destination points are within a range of ZIP codes, then you can use the ZIP code option. This option is the one that is the most used because you can specify a range of cities, based on their ZIP codes.

> **NOTE:** Be aware that sometimes a ZIP code found within a range of ZIP codes may be in a different zone than the rest of the ZIP codes. For example, in the ZIP code range of 55400–55500, the ZIP code 55420 might be in Zone 2, while the other ZIP codes might be in Zone 1. If this situation occurs, you must be sure to single out the ZIP code that falls outside of the zone range and assign it to its own line item. In this situation, there would actually be 3 separate line items for the 2 ranges of ZIP codes and for the individual ZIP code out of the zone. The first range would be defined as 55400–55419. Then the ZIP code 55420 would be on its own line item. Finally, the third line item would be the range of 55421–55500.



NOTE: The Zone/RBN can be an alpha, numerical, or alpha/numerical value. If you make the Zone/RBN an alpha or alpha/numerical value, then the value can be any length. However, if you make the value strictly numerical, it *must* be 8 digits long.

a. Type the low origin ZIP code in the Low Origin field.

b. Type the high origin ZIP code in the High Origin field (the high and low origins can be the same).

c. Type the low destination ZIP code in the Low Destination field.

d. Type the high destination ZIP code in the High Destination field (the high and low destinations can be the same).

e. Create a Zone/RBN code and type it in the Zone/RBN field.

f. Click **Save**, then click **Close**.

Creating a Custom Parcel Tariff from Scratch

Tariff Setup

Rates Tab

You must create rates that support every Zone/RBN that you created while in the Zone/RBN tab. You can make individual rates for each Zone/RBN, or you can create a rate that applies to a range of Zones/RBNs with numeric values. You just must be certain that every Zone/RBN has a rate that supports it.

In the Tariff Setup window:

1. Click the **Rates** tab.
2. Click in the New Record line.
3. Click the **Details** button.
4. Type the same zone number that you created in the Zone/RBN tab in the Zone field.
5. Type the maximum weight that this tariff supports in the Max. Tariff Wgt field.
6. Select the appropriate weight unit in the Wgt. Break Unit field and press **Tab**.
7. Enter the rates using one of the methods listed below:
   - Flat charges
   - Weight rates

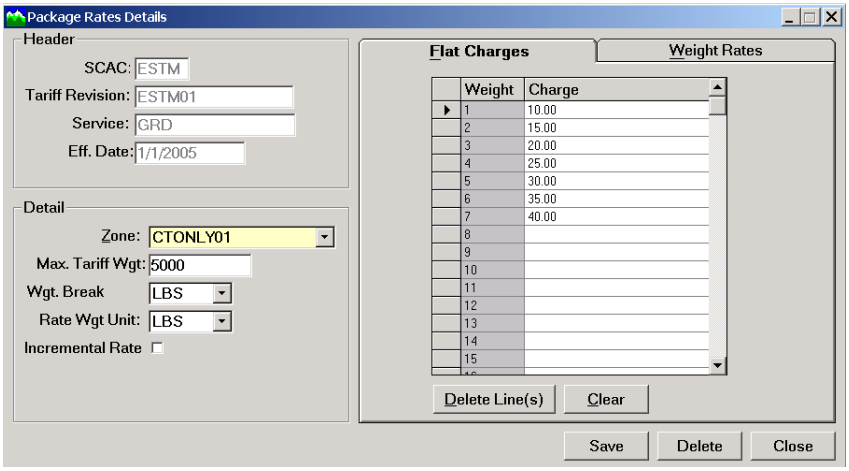
Flat Charges

Flat charges allow you to assign a separate rate per pound.

NOTE: Flat charges only go up to 200 lbs. Use a Weight Rate (see next page) for carriers that ship parcels weighing more than 200 lb. Weight Rates should also be used if the rate is based upon weight breaks.

To create flat charges:

1. Click the **Flat Charges** tab.



2. Type the appropriate dollar amount in the Charge column for the corresponding weight on each line item.
3. Click **Save**, then click **Close**.
4. Complete all of the instructions in *Carrier Setup* elsewhere in this chapter.

NOTE: You must enter a rate for every line item that is within the carrier's weight limit.

Creating a Custom Parcel Tariff from Scratch

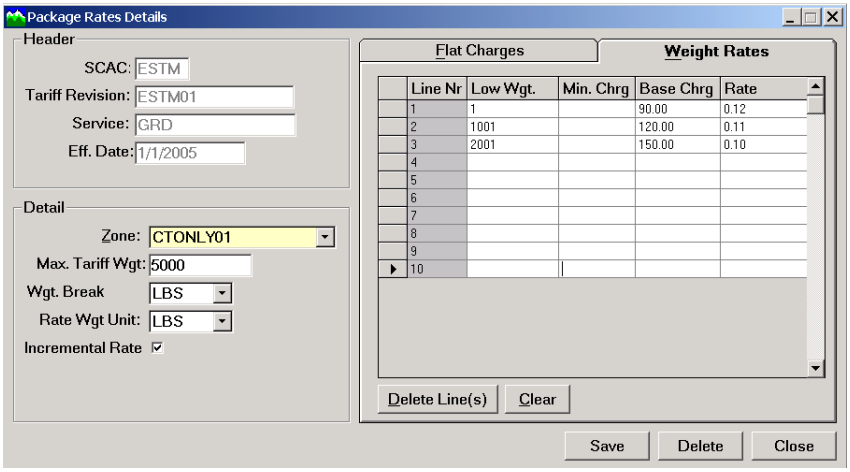
Tariff Setup

Weight Rates

Weight rates allow you to assign rates for a range of weights.

To create weight rates:

1. Click the **Weight Rates** tab.



2. Type the low weight for the first weight range on the first line item.
3. If the carrier charges a minimum charge, then type that charge in the Min. Charge field. Type the full dollar amount, but do not type the "**$**" before the amount.
4. Type the charge for that weight range in the Base Charge field. Type the full dollar amount, but do not type the "**$**" before the amount.
5. Populate the Rate field with the appropriate value. If you want the rate to be the exact dollar amount that you typed in the Base Charge field, then type a "**0**" in the Rate field. If you want a dollar amount added to the Base Charge, then type that value in the Rate field.
6. Select **Incremental Rates** if the carrier uses incremental rates (see below).
7. Repeat these steps for each weight range. Each weight range goes on a separate line item.
8. Click **Save**, then click **Close**.
9. Complete all the instructions in *Carrier Setup* elsewhere in this chapter.

> **NOTE:** Enabling **Incremental Rate** instructs SendSuite Shipping to apply the base charge to a shipment and apply the rate only to the *difference* between the minimum weight and the actual weight of the shipment.
>
> For example, if shipping 1100 lb. using the above screen setup, with **Incremental Rate** enabled, SendSuite Shipping would apply a base charge of $120 and rate 99 lb. at $0.11 (for a total of $130.89). Without **Incremental Rate** enabled, SendSuite would apply the base charge and rate the *entire* 1100 lb. (totalling $241.00).

Creating a Custom LTL Tariff from Scratch

To create a custom LTL tariff from scratch, you must complete the following tasks:

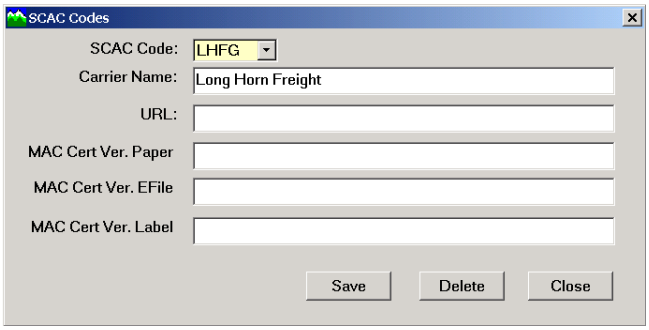
1. Enter the carrier's SCAC code.
2. Create an address record for the carrier.
3. Create the carrier's tariff for each level of service the carrier provides.
4. Set up the carrier profile.
5. Define any additional parameters, such as FAK, discounts, etc.
6. Apply the carrier's new tariff(s) to the shipper(s) who will use the tariff.

Once you have analyzed the carrier's rate structure and entered the required data, you must also test the tariff to be certain that it rates shipments correctly. Complete all of the instructions listed below in the order they appear. You may be instructed to skip a section, depending on the way the LTL carrier rates shipments.

SCAC Code

To enter the SCAC code:

1. Open the **Supporting Data** module from the **Control Center**.
2. Open the **Carrier & Labels** folder.
3. Open the **SCAC Codes** table.



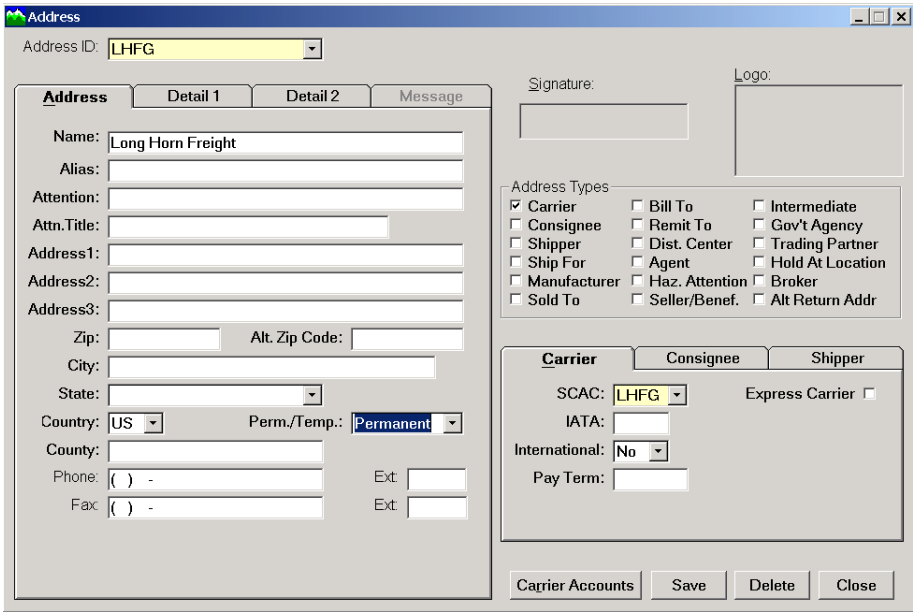
4. Click the blank button to make a new record.
5. Type a three to four letter code for the carrier in all caps in the SCAC Code field.
6. Type the carrier's name in the Carrier Name field.
7. Click **Save**, then click **Close**.
8. Close the **Carrier & Labels** folder.

Creating a Custom LTL Tariff from Scratch

Address Record

To create an address record for the carrier:

1. Open the **Supporting Data** module from the Control Center.
2. Open the **Data** folder.
3. Open the **Address** table.
4. Click the blank button to make a new record.



5. Type the new carrier's SCAC code in the Address ID field.
6. Type the new carrier's name in the Name field.
7. Check the box in front of **Carrier**.
8. Type the new carrier's SCAC code in the SCAC Code field on the **Carrier** tab.
9. Does the new carrier have a IATA code? If it does, then type the two-three letter IATA code in the IATA field. If not, leave that field blank.
10. Does the carrier carry international shipments? If so, then select **Yes** in the International field. If not, select **No** in that field.
11. Does the carrier have payment terms? If so, type the number of the carrier's payment terms (for example, 10 days or 30 days) in the Pay Term field. If not, leave the field blank.
12. Click **Save**, then click **Close**.
13. Close the **Data** folder.

Creating a Custom LTL Tariff from Scratch

Tariff Setup

To set up a carrier's tariff:

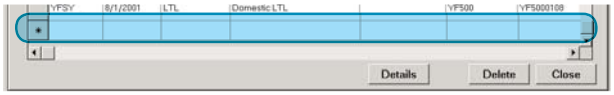
1. Open the **Supporting Data** module from the Control Center.
2. Open the **Carrier & Labels** folder.
3. Open the **Rates** folder.
4. Double-click **Tariff Setup** to display the Tariff Setup window.
5. Complete the instructions listed below to enter the correct data on the following tabs:
   - Tariff header tab
   - Zone/RBN tab
   - Rates tab

NOTE: From this point on, we will refer to the line marked with a ***** as the "New Record" line.

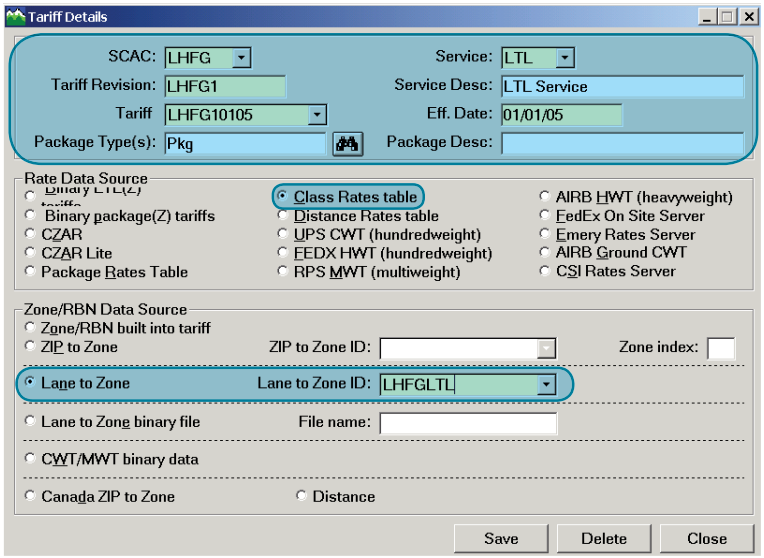
Tariff Header Tab

Under the Tariff Header tab of the Tariff Setup window:

1. Scroll to the bottom of the list of tariffs. Click anywhere in the last empty line, which is marked with a * in the far left gray column.



2. Click the **Details** button.



3. Type the carrier's SCAC code in the SCAC field and press **Tab**.
4. Create a unique Tariff Revision ID and type it in the Tariff Revision field and press **Tab**. When you press **Tab**, SendSuite Shipping automatically fills in the Tariff ID.
5. Select or type **LTL** in the Service field and press **Tab**.
6. (Optional) Type a description of the service in the Service Desc field.

NOTE: Pitney Bowes recommends that you use the carrier's SCAC code followed by a number for the tariff revision. For example, if Joe's Delivery's SCAC is JOES, then type JOES1 as the Tariff Revision ID.

Creating a Custom LTL Tariff from Scratch

Tariff Setup

NOTE: You must type the date as MM/DD/YY.

7. Type the date the tariff took effect in the Eff. Dat**e** field.
8. Click in the circle to the left of Class Rates table.
9. Click in the circle to the left of Lane to Zone**.**
10. Select or type a Lane to Zone ID:
    - If the carrier bases its rates on the same lane to zone that another carrier uses, then you can select the other carrier's Lane to Zone ID from the drop-down list.
    - If the carrier bases its rates on a lane to zone that is not already loaded into SendSuite, then you must create a new Lane to Zone ID and type it in the Lane to Zone ID field.
11. Click **Save**, then click **Close**.

Zone/RBN Tab

NOTE: Pitney Bowes recommends that if you are creating a new Lane to Zone ID that you base the name on the SCAC and the service. For example, Joe's Delivery's Lane to Zone ID might be JOESLTL.

You establish all of the zones that a carrier delivers to when you complete the Zone/RBN tab. If a carrier delivers to a number of zones, then you will create multiple lines on the Zone/RBN tab. Repeat the steps listed below for each Zone/RBN that the carrier supports.

In the Tariff Setup window:

1. Click the **Zone/RBN** tab.
2. Click in the **New Record** line.
3. Click the **Details** button.
4. Type or select the two-letter ISO country code in the Country field (for example, US).
5. Enter the data necessary for rating, depending on the way the carrier determines its rates. You must select one of the following methods and complete the instructions in that section to correctly enter the Lane to Zone data:
    - State
    - City and State
    - ZIP Code

Creating a Custom LTL Tariff from Scratch

Tariff Setup

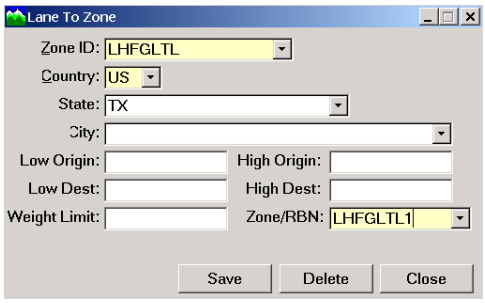
NOTE: The Zone/RBN can be an alpha, numerical, or alpha/numerical value. If you make the Zone/RBN an alpha or alpha/numerical value, then the value can be any length. However, if you make the value strictly numerical, it *must* be 8 digits long.

NOTE: You must always spell the city the same way SendSuite spells the name of the city in the Geograph table. SendSuite will not recognize any variations of the spellings of city names.

NOTE: Pitney Bowes recommends that you click the drop-down arrow in the field and select the city name from the list to assure that you have the spelling that SendSuite recognizes.

State

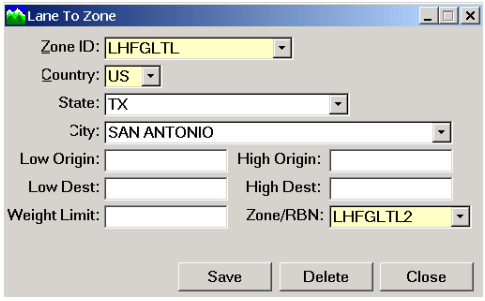
If the carrier's origin point and destination points are always within a certain state, then you can use the state option. This means you create a tariff that will only apply to consignees within the state you indicate in the State field.



a. Type or select the two-letter state code in the State field.
b. Create a Zone/RBN code and type it in the Zone/RBN field.
c. Click **Save**, then click **Close**.

City and State

If the carrier's origin and destination points are always within a certain city and state, then you can use the city and state option. This means that you create a tariff that will only apply to consignees within the city and state that you indicate.



a. Type or select the two-letter state code in the State field.
b. Type or select the name of the city in the City field.
c. Create a Zone/RBN code and type it in the Zone/RBN field.

> **NOTE:** The Zone/RBN can be an alpha, numerical, or alpha/numerical value. If you make the Zone/RBN an alpha or alpha/numerical value, then the value can be any length. However, if you make the value strictly numerical, it *must* be 8 digits long.

d. Click **Save**, then click **Close**.

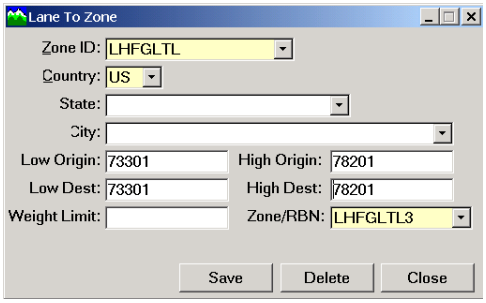
Creating a Custom LTL Tariff from Scratch

Tariff Setup

ZIP Code

If the carrier's origin and destination points are within a range of ZIP codes, then you can use the ZIP code option. This option is the one that is the most used because you can specify a range of cities, based on their ZIP codes.

> **NOTE:** Be aware that sometimes a ZIP code found within a range of ZIP codes may be in a different zone than the rest of the ZIP codes. For example, in the ZIP code range of 55400–55500, the ZIP code 55420 might be in Zone 2, while the other ZIP codes might be in Zone 1. If this situation occurs, you must be sure to single out the ZIP code that falls outside of the zone range and assign it to its own line item. In this situation, there would actually be 3 separate line items for the 2 ranges of ZIP codes and for the individual ZIP code out of the zone. The first range would be defined as 55400–55419. Then the ZIP code 55420 would be on its own line item. Finally, the third line item would be the range of 55421–55500.



a. Type the low origin ZIP code in the Low Origin field.

b. Type the high origin ZIP code in the High Origin field (the high and low origins can be the same).

c. Type the low destination ZIP code in the Low Destination field.

d. Type the high destination ZIP code in the High Destination field (the high and low destinations can be the same).

e. Create a Zone/RBN code and type it in the Zone/RBN field.

f. Click **Save**, then click **Close**.

Creating a Custom LTL Tariff from Scratch

Tariff Setup

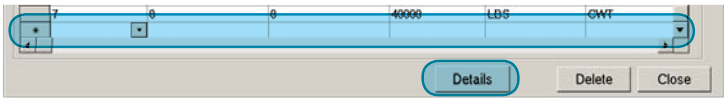
Rates Tab

You must create rates that support every Zone/RBN that you created while in the Zone/RBN tab. You can make individual rates for each Zone/RBN, or you can create a rate that applies to a range of Zones/RBNs. You just must be certain that every Zone/RBN has a rate that supports it.

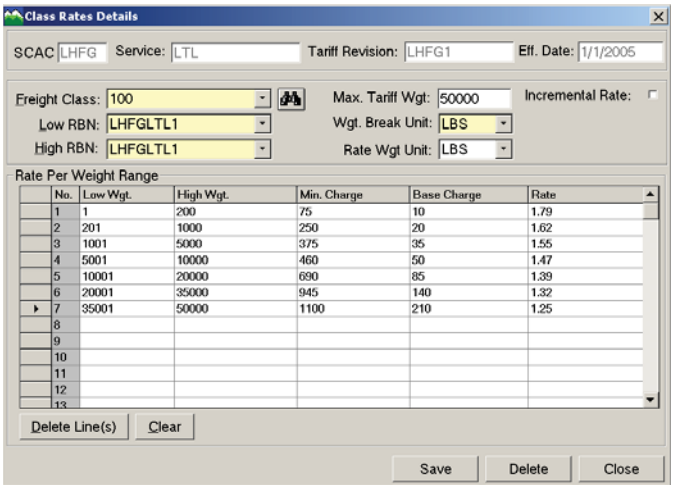
You must also create a rate that supports every freight class. If the carrier does not specify different rates for different freight classes, then you can create an FAK rate. If you decide to create an FAK rate, then you must also complete the instructions to create an FAK record (see *Tariff FAK* elsewhere in this chapter).

In the Tariff Setup window:

1. Click the **Rates** tab.
2. Click the New Record line.



3. Click the **Details** button.



4. Type or select the freight class that this rate supports in the Freight Class field.
5. Type or select the Low RBN number in the Low RBN field. The RBN number is linked with the number you assigned on the Zone/RBN tab.
6. Type or select the High RBN number in the High RBN field. This RBN number is also associated with the number you assigned on the Zone/RBN tab. The low and high RBN numbers can be the same or they can be a range of numbers.
7. (Optional) Type the maximum weight that the tariff will support in the Max Tariff Wgt. field.
8. Type or select the weight units in the Wgt. Break Unit field and press **Tab**. The Rate Wgt Unit field is automatically populated when you press **Tab**.

NOTE: If your carrier has different rates for different freight classes, then you must create a rate for each of those freight classes. If the rate is for FAK, then be sure to complete the FAK instructions found in Chapter 7.

Creating a Custom LTL Tariff from Scratch

Tariff Setup

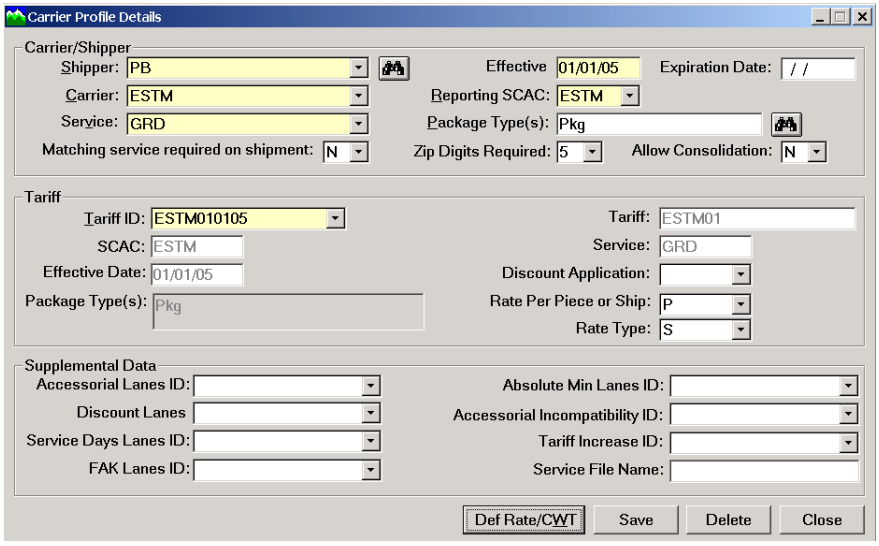
9. Enter the correct data according to how the carrier rates shipments. LTL rating allows you to enter rates according to weight ranges only. You cannot assign a rate per pound unless you enter weight ranges of one pound. Follow these instructions to enter the rates:
   a. Type a low weight and a high weight for the first weight range on the first line item.
   b. If the carrier charges a minimum charge, then type that charge in the Min. Charge field. Type the full dollar amount, but do not type the “$” before the amount.
   c. Type the charge for that weight range in the Base Charge field. Type the full dollar amount, but do not type the “$” before the amount.
   d. Populate the Rate field with the appropriate value. If you want the rate to be the exact dollar amount that you typed in the Base Charge field, then type a “0” in the Rate field. If you want a dollar amount added to the Base Charge, type that value in the Rate field.
   e. Repeat these steps for each weight range. Each weight range goes on a separate line item.
   f. Click **Save**, and then click **Close**.
10. Complete all of the instructions in *Carrier Setup* in the next section of this chapter.

Carrier Setup

After loading or creating a tariff, you must define how those rates will be used in your shipping operations. The Carrier Setup form allows you to specify such parameters as discounts, supported accessorials, and service days.

To set up a carrier:

1. Open the **Supporting Data** module from the **Control Center**.
2. Open the **Carrier & Labels** folder.
3. Open the **Rates** folder.
4. Open **Carrier Setup**.
5. Click in the New Record line (the first blank line at the end of the list that is marked with a ***).
6. Click the **Details** button.



7. Click the binoculars button to the right of the Shipper field and select the shipper from list.
8. Type or select the carrier in the **Carrier** field and then press **Tab**.
9. Select the service from the drop-down in the Service field.
10. If you want to use this carrier when rate shopping, type an “N” in the Matching Service Required on Shipment field.
11. Type the effective date of this carrier in the Effective Date field.
12. (Optional) Type the expiration date for this carrier in the Expiration Date field.
13. Type or select the carrier’s SCAC in the Reporting SCAC field.

NOTE: If you have multiple shipper IDs that will use this carrier, then you must set up each shipper individually.

NOTE: If you type a **Y** in the Matching Service Required on Shipment field, the shipping operator must specify this service and carrier in order to access this tariff. If the shipping operator rate shops all tariffs, SendSuite Shipping will not look at this one.

Carrier Setup

14. (Optional) Select the type of package used by this carrier and this tariff. Click the binoculars button next to the Package Type(s) field and select the package. 

> **NOTE:** In order for the SendSuite to select a tariff with specific package type, the shipping operator must specify that package type in the shipping module. If the shipping operator does not specify the package type shown on the carrier setup, SendSuite will skip this tariff.
> To have SendSuite use this tariff regardless of the package type, leave this field blank.

15. Type the number of ZIP code digits SendSuite must match before it can rate a package in the Zip Digits Required field.
16. Indicate whether this tariff allows consolidation of several shipments into one load in the Allow Consolidation field. SendSuite will default to Y.

NOTE: You must set up a separate carrier record for every carrier tariff you wish to use.

17. Select the tariff to be used in this profile from the drop-down in the Tariff ID field and then press **Tab**. Other fields are automatically populated when you press **Tab**.
18. (Optional) Select the method by which your discounts will be applied from the drop-down in the Discount Application field.
    - **Actual Weight** — The discount is applied using the actual weight of the shipment.
    - **Rated Weight** — The discount is applied using the billed weight of the shipment. This would use the deficit weight or DIM weight instead of the actual weight.
    - **Billable (A/R)** — The discount is applied behind the scenes for accounting purposes.

NOTE: If you do not make a selection, SendSuite will default to Rate Per Piece.

19. Select how SendSuite will rate multiple piece shipments from the drop-down in the **Rate Per Piece or Ship** field.
    - **Rate Per Piece** — The rate will be calculated for every piece in the shipment. For example, for a shipment of three five pound packages SendSuite will rate each package individually to come up with the total freight for the shipment.
    - **Rate Per Shipment** — The rate will be calculated based on the weight of the shipment as a whole. For example, a shipment of three five pound packages will be rated as one 15 pound package. Using this method will usually result in lower freight costs than the Rate Per Piece method.
20. Select the type of tariff being used from the drop-down in the Rate Type field. (If you make no selection, SendSuite Shipping will default to Standard.)

Carrier Setup

NOTE: Typing an ID will activate a tab on the main carrier profile screen. For example, if you type an ID for **Discount Lanes** but you do not type an ID for **FAK Lanes**, only the **Discount** tab will be activated.

NOTE: For some carriers, such as DHL, hazardous materials may also be referred to as "dangerous goods".

NOTE: You must type or select an ID in this field if the tariff is an FAK tariff.

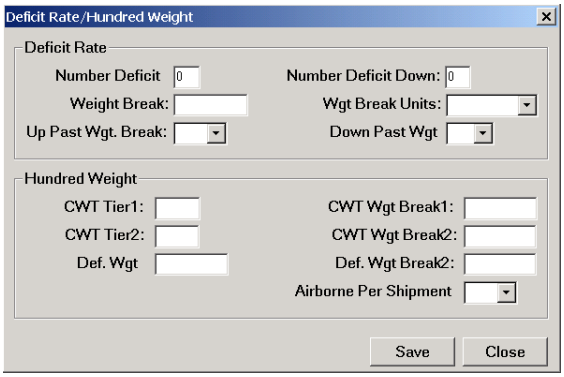
21. In the Supplemental Data area, type unique IDs for any of the other data in the carrier profile.
    - **Accessorial Lanes** — Use this to set up the ancillary costs carriers charge for services such as deliver confirmation, hazardous materials, fuel surcharges, insurance, weekend delivery, oversize packages, etc. SendSuite will default these as NS (Not Supported) unless you set them up. See *Tariff Accessorials* elsewhere in this chapter for instructions to set up accessorial costs.
    - **Discount Lanes** — Use this to set up the discounts you have negotiated with your carriers. See *Tariff Discounts* elsewhere in this chapter for instructions to set up carrier discounts.
    - **Service Days Lanes** — Use this to tell SendSuite how soon a package will get to its destination using this tariff. For example, if this is a second day tariff, then SendSuite needs to know that it cannot be used for overnight delivery. SendSuite will default delivery days to 0 unless you set them up. See *Carrier Service Days* elsewhere in this chapter for instructions to set up carrier service days.
    - **FAK Lanes** — Use this to set up freight of all kinds arrangements you have negotiated with your carriers. See *Tariff FAK* elsewhere in this chapter for instructions to set up an FAK lane.
    - **Absolute Min Lanes** — Use this to set up the minimum charge or weight your carrier requires. For example, an LTL carrier's tariff may go as low as 50 pounds, but the carrier has told you they will not come to your warehouse unless you have 1,000 pounds to ship. See *Tariff Absolute Minimums* elsewhere in this chapter for instructions to set up absolute minimum charges.
    - **Accessorial Incompatibility** — Use this to tell SendSuite what accessorials cannot go together. For example, your carrier may support both inside delivery and hazardous materials, but they will not support inside delivery of hazardous materials. See *Tariff Accessorial Incompatibility* elsewhere in this chapter for instructions to set up accessorial incompatibility.
    - **Tariff Increase** — Use this to set up temporary tariff increases until the actual new tariffs can be loaded. See *Temporary Tariff Increase* elsewhere in this chapter for instructions to enter a tariff increase.
    - **Service File Name** — This field is used to identify a data file used with the tariff. This data file can contain supported postal codes, country codes, port codes, etc.

Carrier Setup

NOTE: For some carriers, such as DHL, hazardous materials may also be referred to as "dangerous goods".

NOTE: If you do not enter this data in the Deficit Weight/Hundred Weight window, SendSuite Shipping will always select the lowest rate, regardless of the weight of the shipment. If you do not want SendSuite Shipping to automatically deficit down, be sure to enter zeroes in the Number Deficit Up and Number Deficit Down fields.

22. To disable deficit weighting, click the **Def Rate/CWT** button:



a. Type a “0” (zero) in the Number Deficit Up field.

b. Type a “0” (zero) in the Number Deficit Down field.

c. Click **Save**, then click **Close**.

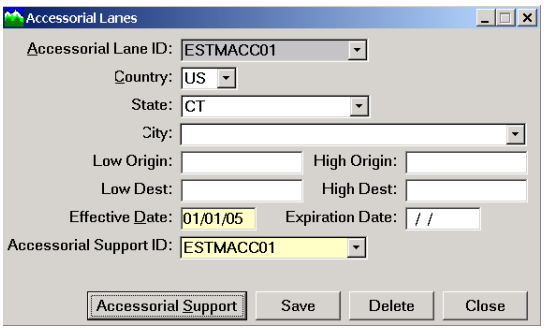
23. Click **Save**, then click **Close**.

Tariff Accessorials

NOTE: If you want to use an existing accessorial file, click the drop-down arrow and select the accessorial file ID. Likewise, once you set up the following accessorials, you can use them for other carriers just by selecting this accessorial lane ID.

To set up accessorials that your carriers support:

1. Open the **Supporting Data** module from the **Control Center**.
2. Double-click the **Carrier & Labels** folder.
3. Double-click the **Rates** folder.
4. Double-click **Carrier Setup**.
5. Click in the line that has the carrier tariff you want to modify.
6. Click the **Details** button.
7. Click in the **Accessorial Lanes ID** field and type a unique ID for the accessorial file.
8. Click **Save**.
9. Click **Close**.
10. Click the **Accessorial Lanes** tab.
11. Click the **Details** button.

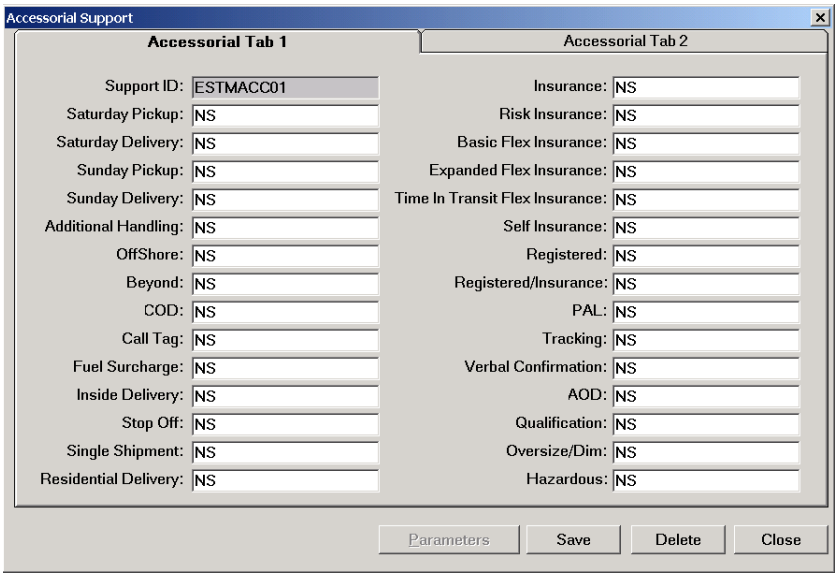


12. Type any information about the lane in which these accessorials apply. For example, if the accessorials you are about to define apply only to deliveries in California, select that state. If your accessorials apply to all delivery destinations, leave all the white fields blank.
13. Type the effective date of the accessorials.
14. Type or select the file with the accessorial information in the Accessorial Support ID field.
    - If these are new accessorial parameters, type a new and unique name in this field and continue following this procedure.
    - If you are using and existing accessorial parameter, skip to Step 23.

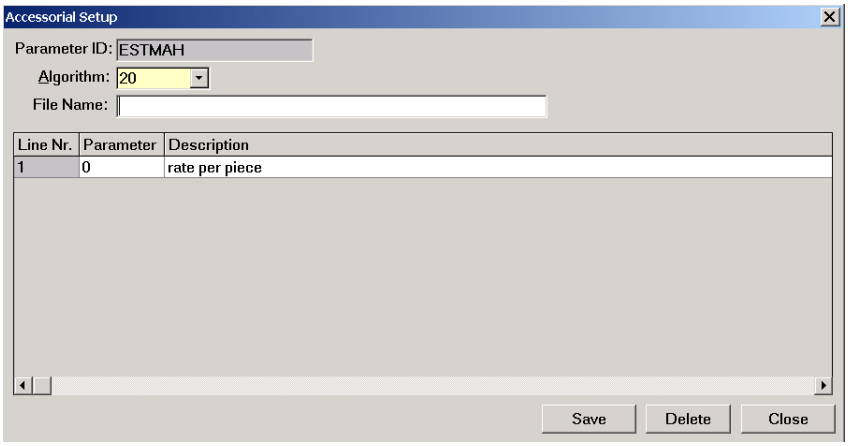
Tariff Accessorials

NOTE: NS means Not Supported. For example, if Residential Delivery is marked as NS, a shipment to a consignee address flagged as Residential would not use this carrier.

15. Click the **Accessorial Support** button.



16. Type an ID for the accessorial supported by the carrier
17. Click the **Parameters** button.



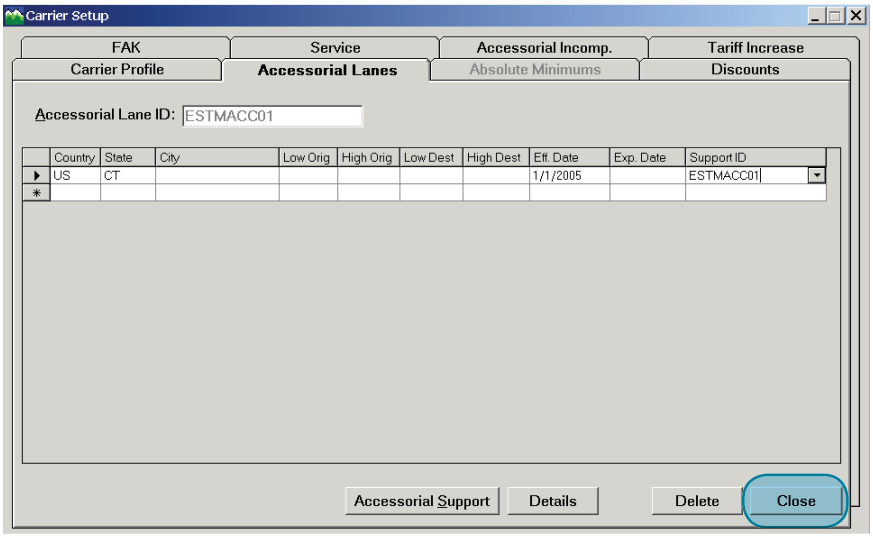
NOTE: Some algorithms are specific to certain accessorial charges, such as Fuel Surcharges, COD, etc.

18. Click the drop-down arrow in the Algorithm field and select the method used to calculate the accessorial charge.

> **NOTE:** Leave the File Name field blank. This field is not used for custom/manual carriers. Use this field when you want to duplicate the algorithm used for a small package carrier (such as UPS). In that case, you would type the file name of the binary file that the carrier uses in this field.

Tariff Accessorials

19. Click **Save**, then click **Close** on the Accessorial Setup window.
20. Repeat step 16 through step 19 for every accessorial charge supported by the carrier.
21. Click **Save,** then click **Close** on the Accessorial Support window.
22. Repeat Step 14 through Step 21 for each unique accessorial lane.
23. Click **Close** on the Accessorial Lanes window.



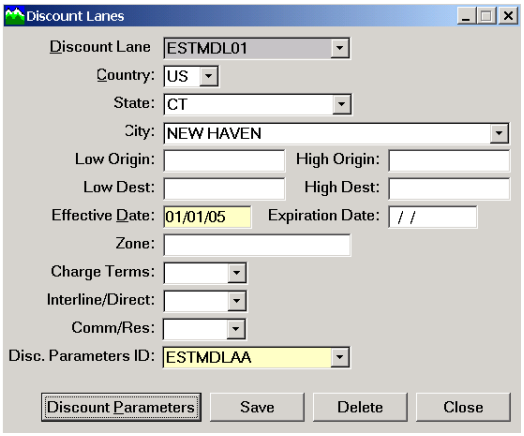
24. Repeat step 5 through step 23 for every tariff that supports accessorial charges.

Tariff Discounts

NOTE: If you want to use an existing discount file, click the drop-down arrow and select the discount file ID. Likewise, once you set up the following discounts, you can use them for other carriers just by selecting this Discount lane ID.

To set up carrier discounts:

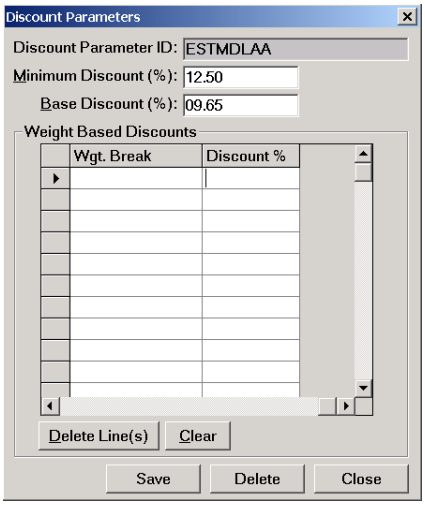
1. Open the **Supporting Data** module from the **Control Center**.
2. Double-click the **Carrier & Labels** folder.
3. Double-click the **Rates** folder.
4. Double-click **Carrier Setup**.
5. Click in the line that has the tariff you want to discount.
6. Click the **Details** button.
7. Click in the **Discount Lanes ID** field and type a unique ID for the discount file.
8. Click **Save**.
9. Click **Close**.
10. Click the **Discount** tab.
11. Click the **Details** button.



12. Type any information about the lane in which this discount applies. For example, if the discount you are about to define applies only to deliveries in California, select that state. If your discounts apply to all delivery destinations, leave all the white fields blank.
13. Type the effective date of the discount.
14. Type or select the file with the discount information in the Disc. Parameters ID field.
    - If these are new discount parameters, then type a new and unique name in this field and continue following this procedure.
    - If you are using an existing discount parameter, then skip to step 18.

Tariff Discounts

15. Click the **Discount Parameters** button.



16. Type information regarding the discount. When typing discount percentages, type the number without the “%” sign. For example, if your discount is 63.2%, type “63.2” in the Discount (%) field.
    a. If the carrier gives you a minimum percentage discount, type that number in the Minimum Discount (%) field.
    b. If the carrier gives you the same percentage for all weights and gives you an incremental discount as weight goes up, type the base discount in the Base Discount (%) field.
    c. If the discounts vary by weight, type the weights and discounts in the Weight Based Discounts. Type the percentage discount in the Discount (%) column and type maximum weight for the discount in the Wgt. Break column.
17. Click **Save**, then click **Close** on the Discount Parameters window.
18. Click **Save**, then click **Close** on the Discount Lanes window.

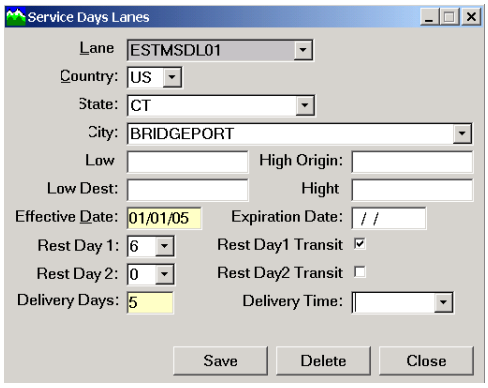
Carrier Service Days

NOTE: If you want to use an existing service file, click the drop-down arrow and select the service file ID. Likewise, once you set up the following service day lanes, you can use them for other carriers just by selecting this service days lanes ID.

Unless told otherwise, SendSuite Shipping will assume that your custom designed LTL carriers can deliver any shipment anywhere in the U.S. within an hour. Use these instructions to define the number of days it takes a carrier to get from your warehouse to a destination.

To define the number of days:

1. Open the **Supporting Data** module from the **Control Center**.
2. Double-click the **Carrier & Labels** folder.
3. Double-click the **Rates** folder.
4. Double-click **Carrier Setup**.
5. Click in the line that has the carrier tariff you want to modify.
6. Click the **Details** button.
7. Click in the **Service Days Lanes ID** field and type a unique ID for the accessorial file.
8. Click **Save**.
9. Click **Close**.
10. Click the **Service** tab.
11. Click the **Details** button.



12. Type any information about this lane. For example, if the carrier can deliver anywhere in California in 2 days, then select that state. If the carrier has defined a range of ZIP codes that can be reached in 3 days, then just fill in the **Low** and **High Dest** fields.
13. Type the effective date of the accessorials (required).
14. If the carrier has defined specific rest days, then fill in the **Rest Day** fields.

> **NOTE:** SendSuite Shipping automatically assumes that Saturday and Sunday are rest days and the trucks are not moving. To change that, select the days, then select the **Rest Day Transit** checkbox.

Carrier Service Days

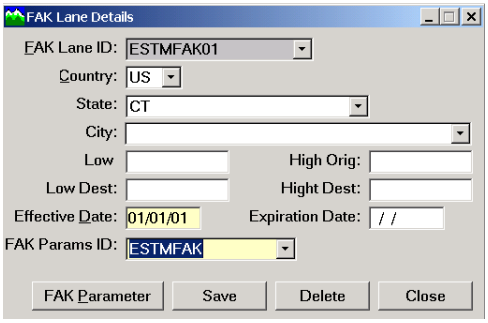
15. Type the number of service days for this lane in the Delivery Days field.
16. Specify a delivery time (optional).
17. Click **Save**, then click **Close** on the Service Days Lanes window.
18. Click in the next line down and repeat step 11 through step 17 for each additional lane you want to define.

Tariff FAK

A freight of all kinds (FAK) agreement changes the way SendSuite Shipping rates shipments. A standard FAK causes all commodities to be rated the same, regardless of the actual freight class. A detailed FAK is used to map one or more freight classes to an alternative freight class.

If you have FAK agreements with your carriers, use these instructions to set them up:

1. Open the **Supporting Data** module from the **Control Center**.
2. Double-click the **Carrier & Labels** folder.
3. Double-click the **Rates** folder.
4. Double-click **Carrier Setup**.
5. Click in the line that has the tariff you want to modify.
6. Click the **Details** button.
7. Click in the **FAK Lanes ID** field and type a unique ID for the discount file.
8. Click **Save**.
9. Click **Close**.
10. Click the **FAK** tab.
11. Click the **Details** button.

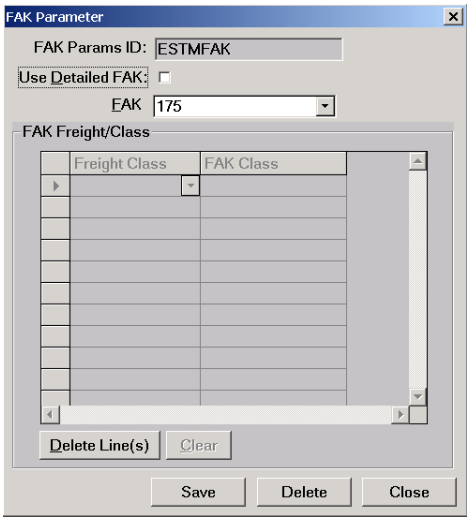


12. Type any information about the lane in which this agreement applies. For example, if your agreement is good only for to deliveries to California, then select that state. If your agreement applies to all delivery destinations, leave all the white fields blank.
13. Type the effective date of the FAK parameter in the Effective Date field.
14. Type or select the file with the discount information in the FAK Params ID field.
    - If this is a new discount parameter, then type a new and unique name in this field and continue following this procedure.
    - If you are using and existing FAK parameter, skip to step 19.

NOTE: If you want to use an existing FAK file, click the drop-down arrow and select that file ID. Likewise, once you set up the following FAK, you can use them for other carriers just by selecting this FAK Lanes ID.

Tariff FAK

15. Click the **FAK Parameters** button.



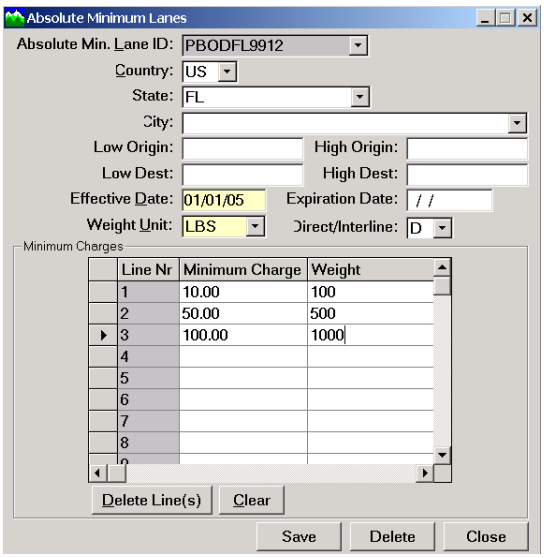
16. Select **Use Detailed FAK** to specify a FAK Class for different freight classes.
    a. In the Freight Class column, select each freight class included in the agreement.
    b. In the FAK Class column, select the class at which the freight will be rated.
17. To select a global FAK select a freight class from the FAK drop-down list.
18. Click **Save**, then click **Close** on the FAK Parameter window.
19. Click **Save**, then click **Close** on the Discount Lanes window.
20. Click in the next line down and repeat step 11 through step 19 for each additional FAK lane.

Tariff Absolute Minimums

NOTE: If you want to use an existing file, click the drop-down arrow and select the file ID. Likewise, once you set up the following minimums, you can use them for other carriers just by selecting this Absolute Min Lanes ID.

To define the minimum rate that an LTL carrier will accept:

1. Open the **Supporting Data** module from the **Control Center**.
2. Double-click the **Carrier & Labels** folder.
3. Double-click the **Rates** folder.
4. Double-click **Carrier Setup**.
5. Click in the line that has the tariff you want to discount.
6. Click the **Details** button.
7. Click in the **Absolute Min Lanes ID** field and type a unique ID for the discount file.
8. Click **Save**.
9. Click **Close**.
10. Click the **Absolute Minimums** tab.
11. Click the **Details** button.



12. Type any information about the lane in which these minimums apply. For example, if the minimums apply only to deliveries in California, then select that state. If your minimums apply to all delivery destinations, leave all the white fields blank.

Tariff Absolute Minimums

13. Type the effective date of the minimums in the Effective Date field.
14. Click the drop-down arrow in the Weight Unit field and select the unit of measure you will use for the weight breaks.
15. Type information regarding the minimums.
    a. Type the lowest weight at which the minimum charge will be assessed in the Weight column.
    b. Type the minimum charge for any shipment greater than that weight in the Minimum Charge column.
    c. Repeat these steps for all minimums defined by the carrier.

> **NOTE:** Direct vs. Interline selections — **Direct** indicates the carrier will ship the package the entire distance. This is the default for SendSuite Shipping.
>
> **Interline** indicates that the carrier will not carry the shipment the entire way (but may offer to take it part of the way). In this case, some restrictions or features (such as tariff absolute minimums) may not apply.

16. Click **Save**, then click **Close** on the Absolute Minimum Lanes window.

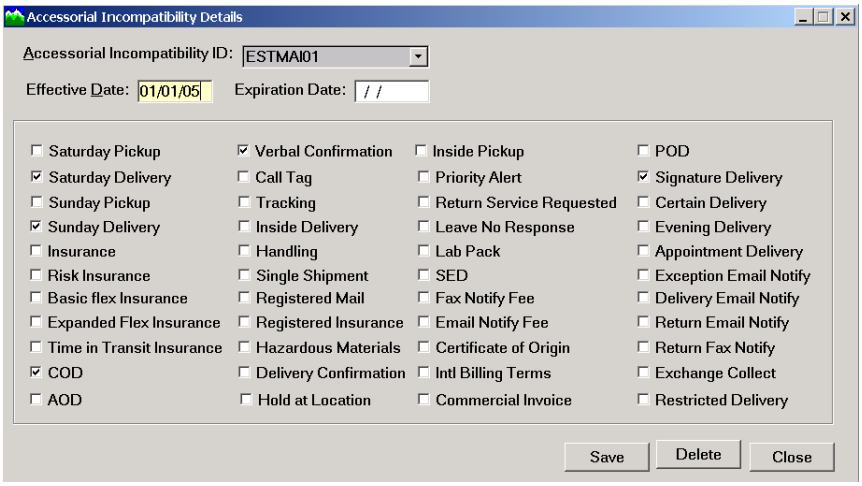
Tariff Accessorial Incompatibility

NOTE: If you want to use an existing incompatibility file, click the drop-down arrow and select that file ID. Likewise, once you set up the following incompatibilities, you can use them for other carriers just by selecting this Accessorial Incompatibility ID.

Some accessorials cannot be combined. For example, a carrier may support Saturday delivery and COD, but they do not collect COD on Saturday.

To tell SendSuite Shipping which accessorials cannot be combined:

1. Open the **Supporting Data** module from the **Control Center**.
2. Double-click the **Carrier & Labels** folder.
3. Double-click the **Rates** folder.
4. Double-click **Carrier Setup**.
5. Click in the line that has the carrier tariff you want to modify.
6. Click the **Details** button.
7. Click in the **Accessorial Incompatibility ID** field and type a unique ID for the accessorial file.
8. Click **Save**.
9. Click **Close**.
10. Click the **Accessorial Incomp** tab.
11. Click the **Details** button.



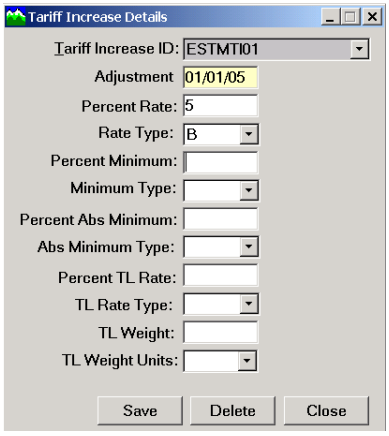
12. Select the accessorials that cannot be combined.
13. Type the effective date of the incompatibility.
14. Click **Save**, then click **Close** on the Accessorial Incompatibility Details window.
15. Click in the next line down and repeat step 11 through step 14 for every other combination of accessorial incompatibility.

Temporary Tariff Increase

On occasion, carriers may increase their rates before Pitney Bowes can send you an update.

To temporarily define the tariff increase:

1. Open the **Supporting Data** module from the **Control Center**.
2. Double-click the **Carrier & Labels** folder.
3. Double-click the **Rates** folder.
4. Double-click **Carrier Setup**.
5. Click in the line that has the carrier tariff that you will temporarily increase.
6. Click the **Details** button.
7. Click in the **Tariff increase ID** field and type a unique ID for the tariff increase file.
8. Click **Save**.
9. Click **Close**.
10. Click the **Tariff Increase** tab.
11. Click the **Details** button.



12. Type the effective date for the change in the Adjustment Date field.
13. Type the percent of the increase as a whole number in the Percent Rate field. For example, if the rate has increased by 5%, type 5 in the Percent Rate field.

Temporary Tariff Increase

14. Click the drop-down arrow in the Rate Type field and indicate how this rate increase will be handled with others you have input.
    - **Base Percent** — This percentage will be calculated on the original tariff and will ignore any other tariff increase you entered.
    - **Cumulative** — This percentage will be added to other tariff increases you have entered. For example, if you entered a tariff increase in May for 2%, and you are entering a cumulative tariff increase in July for 5%, the freight will be figured at 7.1% of the original tariff.
    - **Noncumulative** — This percentage will not be added to other tariff increases you have entered. For example, if you entered a tariff increase in May for 2%, and you are entering a cumulative tariff increase in July for 5%, the freight will be figured at 7% of the original tariff.
15. Click **Save**, then click **Close** on the Tariff Increase Details window.
16. Repeat step 5 through step 15 for every tariff that has changed.

Borrowing a Tariff

These instructions can be used to create a custom tariff using an existing tariff. To borrow another carrier's tariff, follow the steps below. It is not necessary to create a tariff header, zones, or rates since those have already been defined for the master tariff.

Clone a Carrier Setup

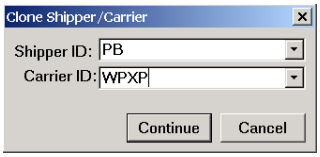
When you clone a carrier setup and borrow the tariff that the carrier uses, you are borrowing all of that carrier's setup, including delivery points, accessorial charges, discounts, etc. Remember to change these items to reflect the new carrier's accurate information.

To clone a carrier setup:

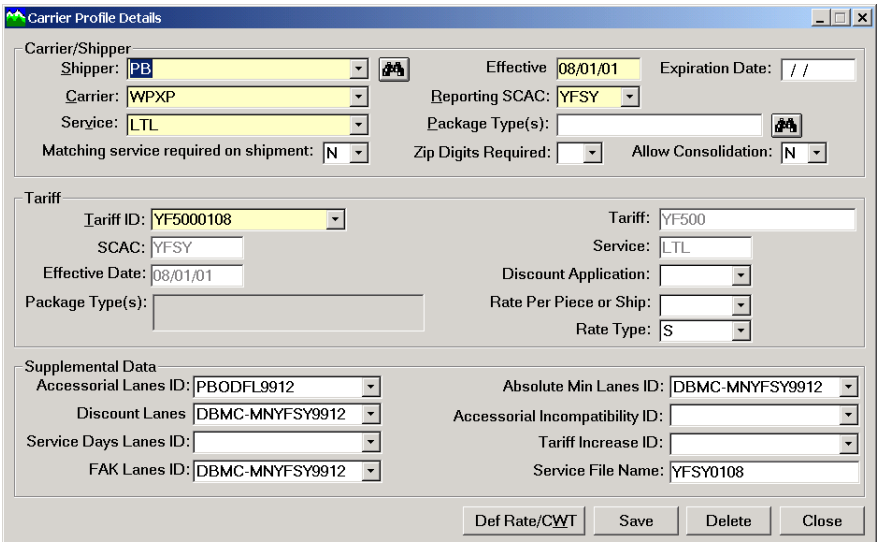
1. Open the **Supporting Data** module from the **Control Center**.
2. Double-click the **Carrier & Labels** folder.
3. Double-click the **Rates** folder.
4. Double-click **Carrier Setup**.
5. Scroll to the carrier you want to clone and click in the grey area to the left to highlight the entire line.



6. Click the **Clone** button.
7. Select or type the new carrier ID in the Carrier ID field.



8. Click **Continue**.
9. Click the **Details** button.



Borrowing a Tariff

Clone a Carrier Setup

10. Select the method by which your discounts will be applied from the drop-down in the Discount Application field (optional).
    - Actual Weight — The discount is applied using the actual weight of the shipment.
    - **Rated Weight** — The discount is applied using the billed weight of the shipment. This would use the deficit weight or DIM weight instead of the actual weight.
    - **Billable (A/R)** — The discount is applied behind the scenes for accounting purposes.
11. Select how the discount will be applied on a per shipment basis from the drop-down in the Rate Per Piece or Ship field (optional).
    - **Rate Per Piece** — The discount will be calculated and applied for every piece in the shipment.
    - **Rate Per Shipment** — The discount will be calculated and applied to the shipment as a whole.
12. Select **B** (Borrowed Rates) for the type of tariff being used from the drop-down in the Rate Type field.
13. In the Supplemental Data area, type unique IDs for any of the other data in the carrier profile.

> **NOTE:** Typing an ID will activate a tab on the main carrier profile screen. For example, if you type an ID for Discount Lanes but you do not type an ID for FAK Lanes, only the Discount tab will be activated.

NOTE: For some carriers, such as DHL, hazardous materials may also be referred to as "dangerous goods".

- Accessorial Lanes — Use this to set up the ancillary costs that carriers charge for services such as deliver confirmation, hazardous materials, fuel surcharges, insurance, weekend delivery, oversize packages, etc. SendSuite will default these as Not Supported unless you set them up.
- Discount Lanes — Use this to set up the discounts you have negotiated with your carriers.
- Service Days Lanes — Use this to tell SendSuite how soon a package will get to its destination using this tariff. For example, if this is a second day tariff, then SendSuite needs to know that it cannot be used for overnight delivery. SendSuite will default delivery days to 0 unless you set them up.
- FAK Lanes — Use this to set up freight of all kinds arrangements you have negotiated with your carriers.
- Absolute Min Lanes — Use this to set up the minimum charge or weight your carrier requires. For example, an LTL carrier’s tariff may go as low as 50 pounds, but the carrier has told you they will not come to your warehouse unless you have 1,000 pounds to ship.

Borrowing a Tariff

Clone a Carrier Setup

NOTE: For some carriers, such as DHL, hazardous materials may also be referred to as "dangerous goods".

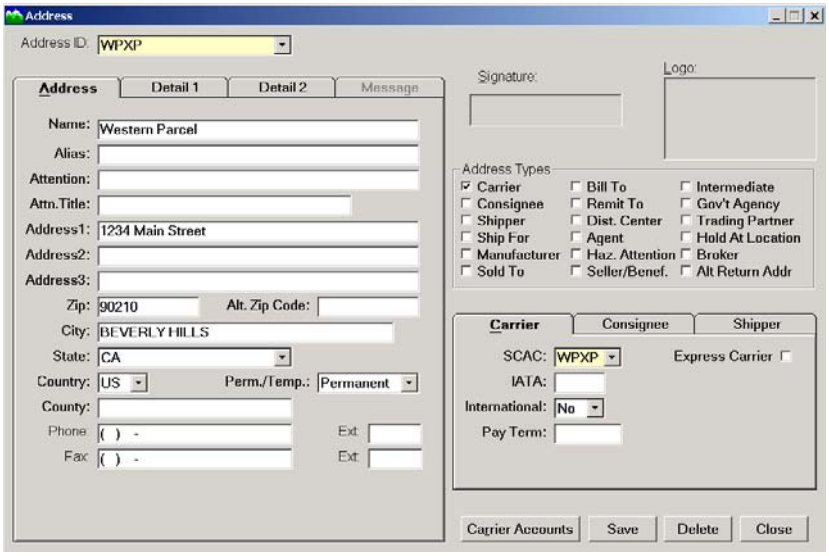
- Accessorial Incompatibility — Use this to tell SendSuite what accessorials cannot go together. For example, your carrier may support both inside delivery and hazardous materials, but they will not support inside delivery of hazardous materials.
- Tariff Increase — Use this to set up temporary tariff increases until the actual new tariffs can be loaded.
- Service File Name — This field is used to identify a data file used with the tariff. This data file can contain supported postal codes, country codes, port codes, etc.

14. Click **Save**.
15. Click **Close**.

Create the Carrier Address Record

To create the carrier address record:

1. Open the **Supporting Data** module from the **Control Center**.
2. Open the **Data** folder
3. Open the **Address** table.
4. Click the **Blank Current Form** button on the horizontal toolbar.



5. Type the carrier's SCAC code in the **Address ID** field.
6. Type the carrier's name in the **Name** field.
7. Check the **Carrier** box in the **Address Types** area of the window.
8. Type or select the carrier's SCAC code in the **SCAC** field.

Borrowing a Tariff

Create the Carrier Address Record

9. (Optional) Specify the following about the carrier:
   - IATA
   - If it handles international shipments
   - If it is an express carrier
   - Pay terms
10. Click **Save**, then click **Close**.

Set Up the Carrier PRO Numbers or Tracking Numbers

You must set up PRO numbers or tracking numbers for this carrier. See “Setting up PRO Numbers and Tracking Numbers” on page 49 for instructions to do this.

Select or Create a Label

If you want to print a label for this carrier, you must select a label to be associated with the carrier. See the instructions in Chapter 7: Labels, beginning on page 7-1, for instructions to select or create a label for the carrier.

Add the Carrier to a Rate Shop Group and/or Routing Instruction

If the new carrier is to be used in a rate shop group or as part of a routing instruction, then you must add it to those groups. See Creating Rate Shop Groups on page 2-19 and Creating Routing Instructions on page 2-21 for instructions to do this.

Manual Rating

You can manually rate a shipment using a “dummy” carrier. A conditional logic script prompts the user for the carrier, total freight and pro number to be assigned to the shipment.

EXAMPLE: One instance where you might consider manual rating is for a company that rarely uses LTL services. Such a company would probably find it more cost effective to use a manual carrier than purchase an actual LTL tariff.

There are two major components required for manual rating. The first, creating a manual tariff (below), involves modifying a number of settings in the Supporting Data module.

The second component, using VB Scripts, involves creating a new script and associating it with a shipping screen. See Creating the VB Script elsewhere in this chapter.

This section provides you with information on:

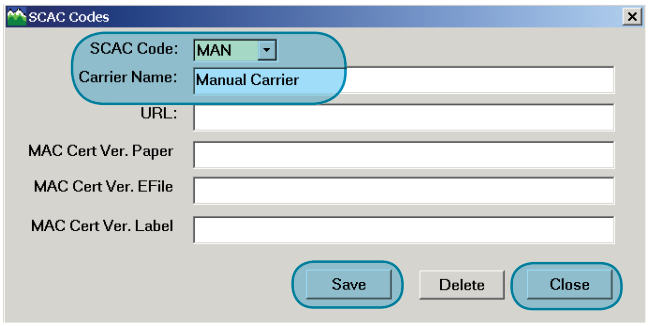
- Creating the manual carrier
- Creating the VB Scripts needed for manual rating.
- Associating the scripts with a browser shipping screen.
- Processing a shipment from the browser using manual rates.

Creating the Manual Carrier

SendSuite always rates a shipment. Therefore, in order to manually rate a shipment, you must first start with an existing tariff. Following this process, you will set up an LTL tariff so you can print a bill of lading.

To create the manual carrier:

1. Open the **Supporting Data** module from the **Control Center**.
2. Open the **Carrier & Labels** folder.
3. Open the **SCAC Codes** table.
4. Click the blank button to make a new record. 

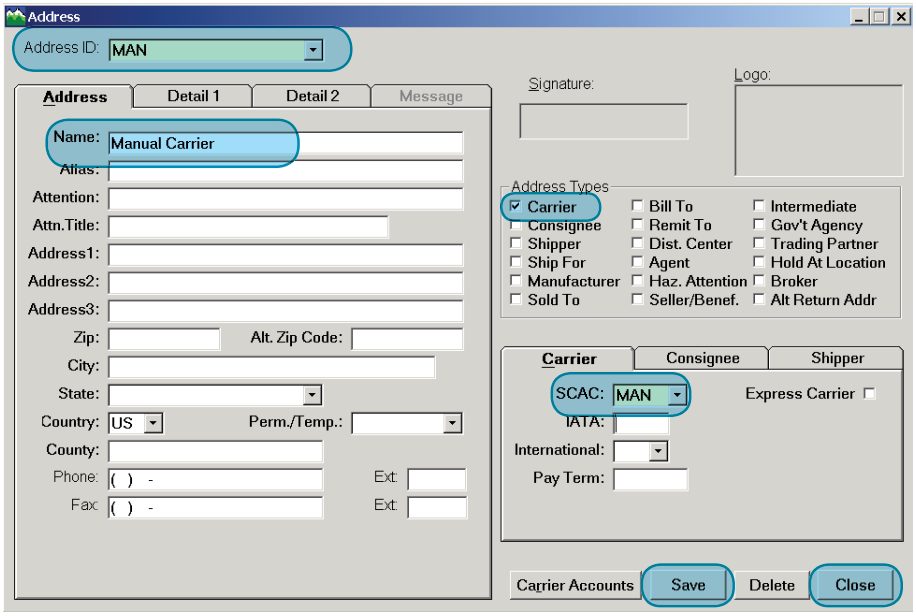


5. Type **MAN** in the **SCAC Code** field.
6. Type **Manual Carrier** in the **Carrier Name** field.
7. Click **Save**, and then click **Close**.
8. Close the **Carrier & Labels** folder.

Manual Rating

Creating the Manual Carrier

9. Open the **Data** folder.
10. Open the **Address** table.
11. Click the blank button to make a new record. 

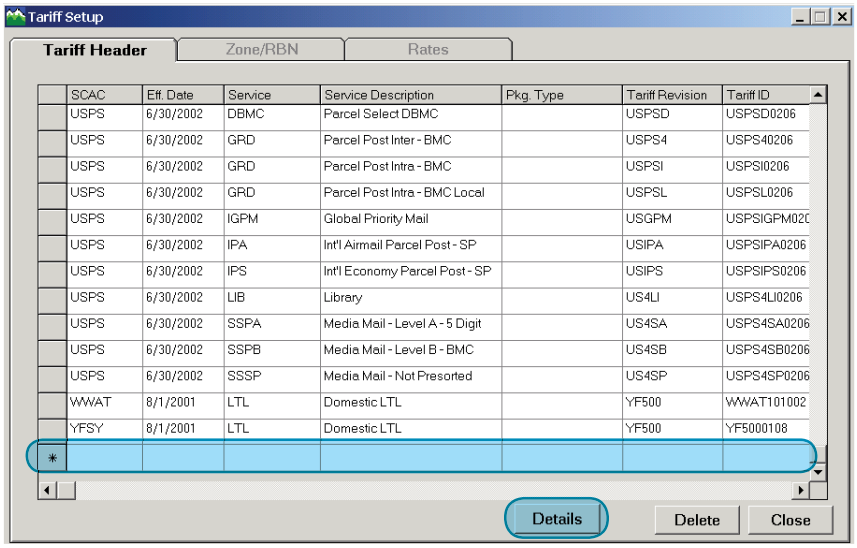


12. Type **MAN** in the **Address ID** field.
13. Type **Manual Carrier** in the **Name** field.
14. Select **Carrier** under **Address Types**.
15. Type **MAN** in the **SCAC Code** field on the **Carrier** tab.
16. Click **Save**, and then click **Close**.
17. Close the **Data** folder.
18. Open the **Rates** folder.
19. Open the **Tariff Setup** table.

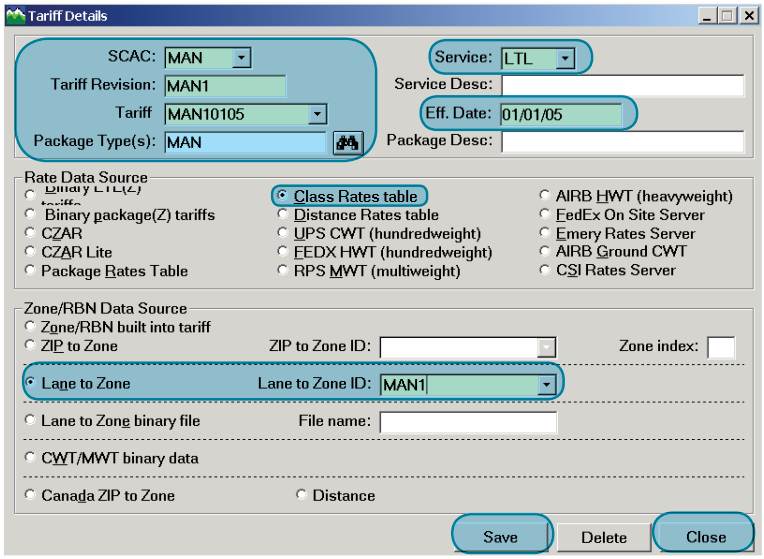
Manual Rating

Creating the Manual Carrier

20. Scroll to the bottom of the list of tariffs. Click anywhere in the last empty line, which is marked with a * in the far left gray column.


Tariff Setup
Tariff Header
Zone/RBN
Rates
SCAC
Eff. Date
Service
Service Description
Pkg. Type
Tariff Revision
Tariff ID
USPS 6/30/2002 DBMC Parcel Select DBMC USPSD USPSD0206
USPS 6/30/2002 GRD Parcel Post Inter - BMC USPS4 USPS40206
USPS 6/30/2002 GRD Parcel Post Intra - BMC USPSI USPSI0206
USPS 6/30/2002 GRD Parcel Post Intra - BMC Local USPSL USPSL0206
USPS 6/30/2002 IGPM Global Priority Mail USGPM USPSIGPM020
USPS 6/30/2002 IPA Int'l Airmail Parcel Post - SP USIPA USPSIPA0206
USPS 6/30/2002 IPS Int'l Economy Parcel Post - SP USIPS USPSIPS0206
USPS 6/30/2002 LIB Library US4LI USPS4LI0206
USPS 6/30/2002 SSPA Media Mail - Level A - 5 Digit US4SA USPS4SA0206
USPS 6/30/2002 SSPB Media Mail - Level B - BMC US4SB USPS4SB0206
USPS 6/30/2002 SSSP Media Mail - Not Presorted US4SP USPS4SP0206
WWAT 8/1/2001 LTL Domestic LTL YF500 WWAT101002
YFSY 8/1/2001 LTL Domestic LTL YF500 YF5000108
Details
Delete
Close

21. Click the **Details** button.

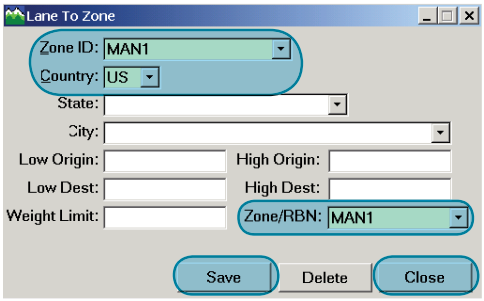


22. Type **MAN** in the **SCAC** field and then press **Tab**.
23. In the **Tariff Revision** field type **MAN1** and then press **Tab**.
24. In the **Package Type(s)** field, select **MAN**.
25. Type **LTL** in the **Service** field then and press **Tab**.
26. Click in the circle to the left of **Class Rates table**.
27. Click in the circle to the left of **Lane to Zone**.
28. In the **Lane to Zone ID** field, type **MAN1**.
29. Click **Save**, and then click **Close**.
30. Click the **Zone/RBN** tab.

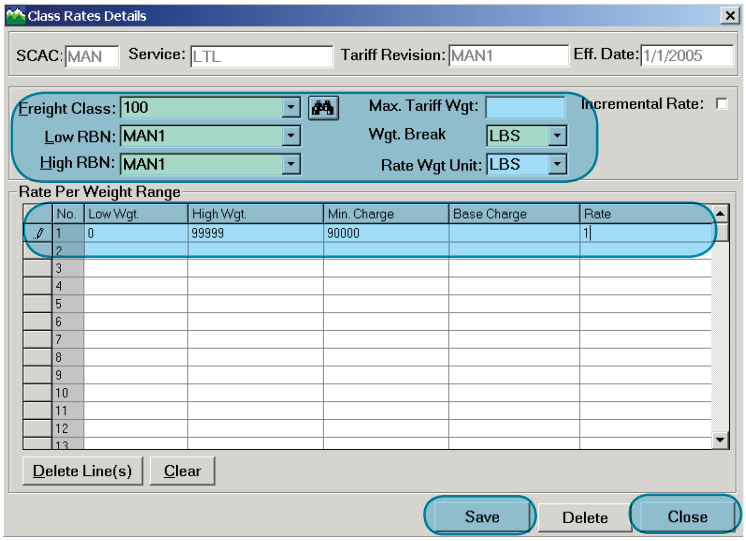
Manual Rating

Creating the Manual Carrier

31. Click the **Details** button.



32. Type **US** in the **Country** field.
33. Type **MAN1** in the **Zone/RBN** field.
34. Click **Save**, then click **Close**.
35. Click the **Rates** tab.
36. Click the **Details** button.



37. Type **100** in the **Freight Class** field.

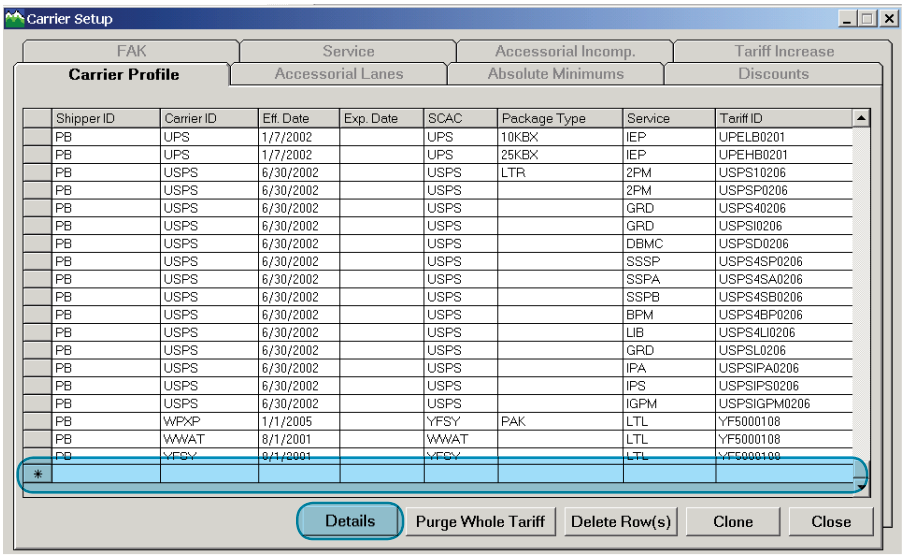
> **NOTE:** Your freight classes may vary when you input the shipment. Instead of creating a rate for every class, you are telling the system to use one rate for all classes. The class you use here has no effect on what prints on the bill of lading. The BOL will always contain the commodities and classes you entered on the shipping screen. We will set the freight of all kinds (FAK) parameter later.

38. Type **MAN1** in the **Low RBN** field.
39. Type **MAN1** in the **High RBN** field.
40. Type **Lbs** in the **Wgt. Break Unit** field and then press **Tab**.
41. Type **0** (zero) for a low weight and **99999** for a high weight.
42. Type **90000** in the **Min. Charge** field.

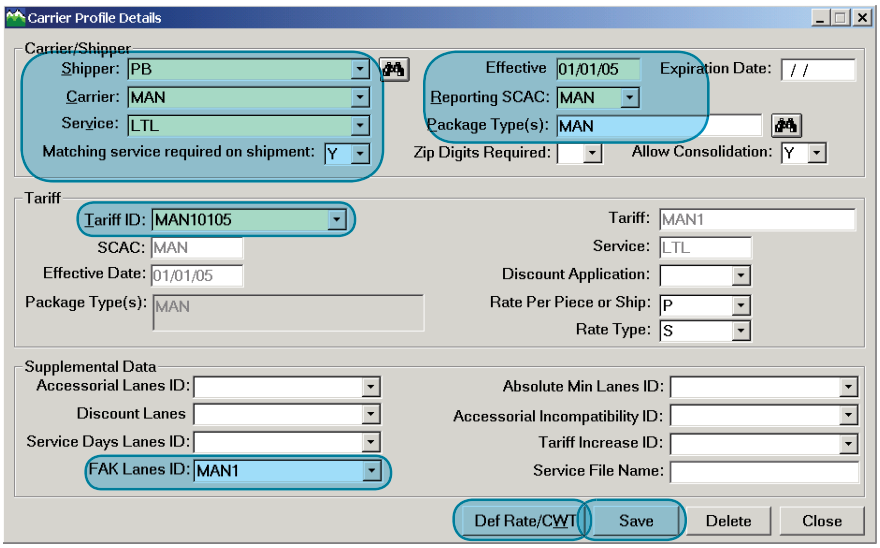
Manual Rating

Creating the Manual Carrier

43. Type **1** the Rate field.
44. Click **Save**, and then click **Close**.
45. Close the **Tariff Setup**.
46. Open **Carrier Setup**.
47. Click in the last line in the table.


Carrier Setup
FAK
Service
Accessorial Incomp.
Tariff Increase
Carrier Profile
Accessorial Lanes
Absolute Minimums
Discounts
Shipper ID | Carrier ID | Eff. Date | Exp. Date | SCAC | Package Type | Service | Tariff ID
PB | UPS | 1/7/2002 | | UPS | 10KBX | IEP | UPELB0201
PB | UPS | 1/7/2002 | | UPS | 25KBX | IEP | UPEHB0201
PB | USPS | 6/30/2002 | | USPS | LTR | 2PM | USPS10206
PB | USPS | 6/30/2002 | | USPS | | 2PM | USPSP0206
PB | USPS | 6/30/2002 | | USPS | | GRD | USPS40206
PB | USPS | 6/30/2002 | | USPS | | GRD | USPSI0206
PB | USPS | 6/30/2002 | | USPS | | DBMC | USPSD0206
PB | USPS | 6/30/2002 | | USPS | | SSSP | USPS4SP0206
PB | USPS | 6/30/2002 | | USPS | | SSPA | USPS4SA0206
PB | USPS | 6/30/2002 | | USPS | | SSPB | USPS4SB0206
PB | USPS | 6/30/2002 | | USPS | | BPM | USPS4BP0206
PB | USPS | 6/30/2002 | | USPS | | LIB | USPS4LI0206
PB | USPS | 6/30/2002 | | USPS | | GRD | USPSL0206
PB | USPS | 6/30/2002 | | USPS | | IPA | USPSIPA0206
PB | USPS | 6/30/2002 | | USPS | | IPS | USPSIPS0206
PB | USPS | 6/30/2002 | | USPS | | IGPM | USPSIGPM0206
PB | WPXP | 1/1/2005 | | YFSY | PAK | LTL | YF5000108
PB | WWAT | 8/1/2001 | | WWAT | | LTL | YF5000108
Details
Purge Whole Tariff
Delete Row(s)
Clone
Close

48. Click the **Details** button.



NOTE: If you have multiple shipper IDs that will use this carrier, then you must set up each shipper individually.

49. Click on the binoculars button to the right of the **Shipper** field and select the shipper from list. 
50. Type **MAN** in the **Carrier** field and then press **Tab**.
51. Type **LTL** in the **Service** field.

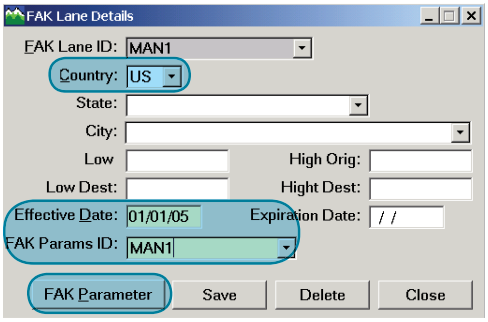
Manual Rating

Creating the Manual Carrier

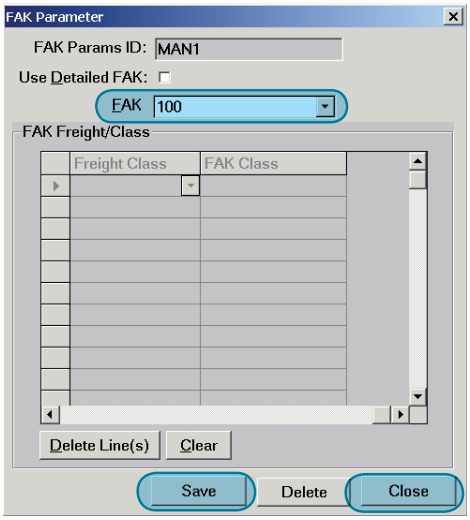
52. Select **Y** in the **Matching service required on shipment** field.

> **NOTE:** This will make sure that an operator does not see the dummy carrier when rate shopping for parcel shipments.

53. Type an effective date of this carrier in the **Effective Date** field.
54. Type **MAN** in the **Reporting SCAC** field.
55. Type **MAN** in the **Package Type(s)** field.
56. Type **Y** in the **Allow Consolidation** field.
57. From the drop-down in the **Tariff ID** field, select the tariff you setup before and then press **Tab**. The tariff ID will be MAN1 followed by a date.
58. In the **FAK Lanes** field type **MAN1**.
59. Click **Save**.
60. On the **Carrier Setup** window, click the **FAK** tab.
61. Click the **Details** button.



62. In the **Country** field, type **US**.
63. Input a date in the **Effective Date** field.
64. In the **FAK Params ID** field, type **MAN1**.
65. Click the **FAK Parameter** button.



66. In the **FAK Class** field, type **100**.

NOTE: The freight of all kinds (FAK) will make sure that the shipment rates regardless of the commodities that are entered at the time of shipping. Make sure that the class you use here is the same as the class you used to set up the rate in the Tariff Setup.

Manual Rating

67. Click **Save**, and then click **Close**.
68. Click **Save**, and then click **Close**.
69. Close the **Carrier Setup** form.
70. Close the **Supporting Data** module.

Creating the Manual Carrier

Creating the VB Script

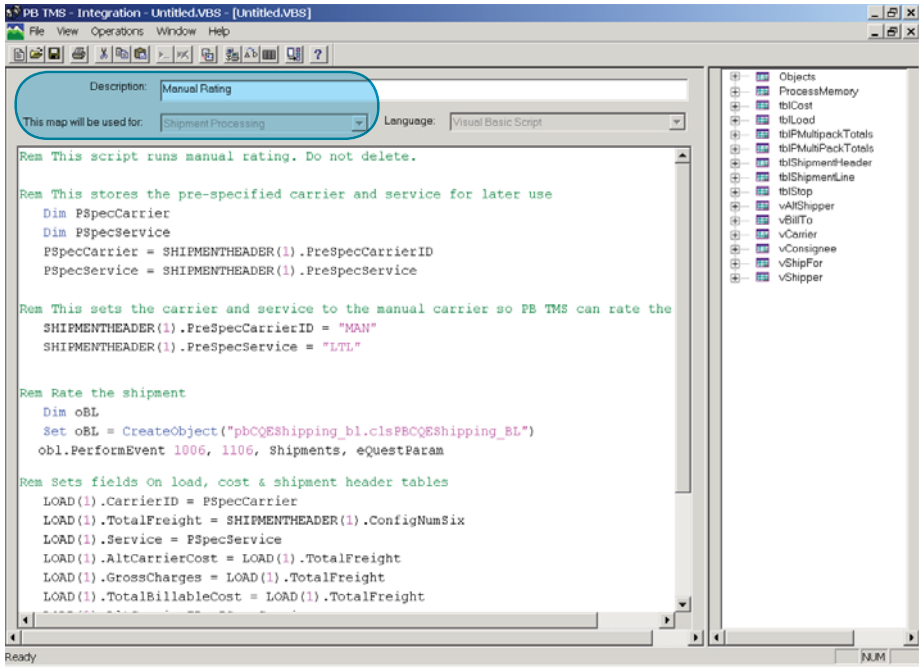
The following script sets carrier and service values on the shipping screen. There are several variables in the script that are specific to your operation.

Before writing the script, identify the following:

- Screen ID — To get the ID, open the Shipping module and then select Setup Shipment Processing. Open the screen, and the ID number will appear on the Settings tab.
- Manual Rate Field — You must choose one of eight configurable number fields where you will type the rate you want to use. The example below will use ConfigNumSix.

Use the following instructions to create the manual rating script.

1. From the Control Center, open the **Integration** module.
2. Click the **New** button. 
3. Select **Script** and then click **OK**.



4. In the **Description** field, type **Manual rating**.
5. From the **This map will be used for** drop-down list, select **Shipment Processing**.

Manual Rating

Creating the VB Script

6. Create the following script:

```
Rem This script runs manual rating. Do not delete.

Rem This stores the pre-specified carrier and service for
Rem later use.
   Dim PSpecCarrier
   Dim PSpecService
   PSpecCarrier = SHIPMENTHEADER(1).PreSpecCarrierID
   PSpecService = SHIPMENTHEADER(1).PreSpecService

Rem This sets the carrier and service to the manual carrier
Rem so SendSuite can rate the shipment.
Rem We assume there is a commodity in tblCommodity with
Rem the ID "100." Ensure there is a commodity in the line
Rem item for the shipment or the bill of lading will not
Rem print.
   SHIPMENTHEADER(1).PreSpecCarrierID = “MAN”
   SHIPMENTHEADER(1).PreSpecService = “LTL”
   SHIPMENTHEADER(1).SHIPMENTLINE(1).CommodityCode = "100"


Rem Rate the shipment
   Dim oBL
   Set oBL = CreateObject("PBCQEShipping_bl.clsPBCQEShipping_bl")
   obl.PerformEvent 1006, 1106, Shipments, eQuestParam


Rem Sets fields on load, cost & shipment header tables
   LOAD(1).CarrierID = PSpecCarrier
   LOAD(1).TotalFreight = SHIPMENTHEADER(1).ConfigNumSix
   LOAD(1).Service = PSpecService
   LOAD(1).AltCarrierCost = LOAD(1).TotalFreight
   LOAD(1).GrossCharges = LOAD(1).TotalFreight
   LOAD(1).TotalBillableCost = LOAD(1).TotalFreight
   LOAD(1).AltCarrierID =PSpecCarrier
   SHIPMENTHEADER(1).PreSpecCarrierID = PSpecCarrier
   SHIPMENTHEADER(1).PreSpecService = PSpecService
   SHIPMENTHEADER(1).DirectCost = LOAD(1).TotalFreight
   SHIPMENTHEADER(1).ProratedCarrierCost = LOAD(1).TotalFreight
   LOAD(1).COST(1).Amount = LOAD(1).TotalFreight
   LOAD(1).COST(1).Rate = LOAD(1).TotalFreight
   LOAD(1).COST(1).CostType = “LINEHL”
```

NOTE: This is where you need to screen ID and the master event ID. In this example, the screen is 1006 and the rate event ID is 1106. The rate event ID should stay the same, but you will need to change your screen ID.

NOTE: This is where you get the rate that the operator typed on the shipping screen. You can use a different field for the rate.

7. Save the file as **MAN_RATE**.

Manual Rating

This allows you to add a configurable event to the shipping screen that calls the script.

Associating the VB Script with a Shipping Screen

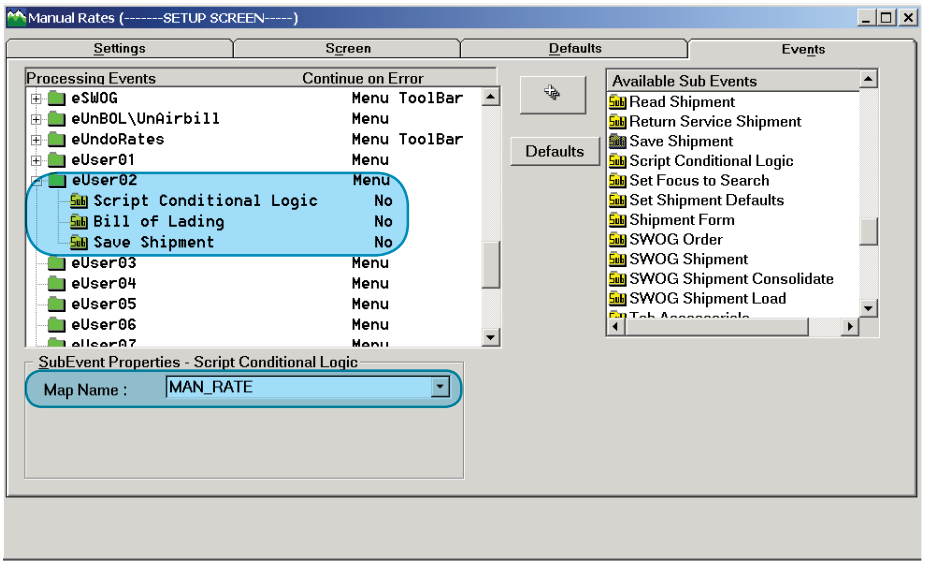
There are two steps to this procedure:

- Set the VBScript you created as a sub-event
- Add the fields to the screen.

Modifying the Sub-event

To modify the sub-event:

1. Open the **Shipping** module.
2. Create a new **Shipping** screen.
3. Click the **Events** tab.



4. Select any of the unused user configurable folders.
5. Complete the User Function Properties.
   a. Type the user description you want on the menu in the **Menu Caption** field. For example, **Manual Rating**.
   b. (optional) Assign a hot key combination to automatically call the event in the shipping screen.
6. Drag the **Script Conditional Logic** sub-event from the **Available Sub-events** list into the selected folder.
   a. Drag the **Save Shipment** sub-event into the selected folder.
   b. (optional) Drag the **Bill of Lading** sub-event into the selected folder.
7. With the **Script Conditional Logic** sub-event highlighted, click the down-arrow next to the **Map Name** field and select **MAN_RATE**.
8. Save your changes.

NOTE: Other optional subevents include: **Generate Tracking Number** and **Print Carrier Label.**

Manual Rating

Associating the VB Script with a Shipping Screen

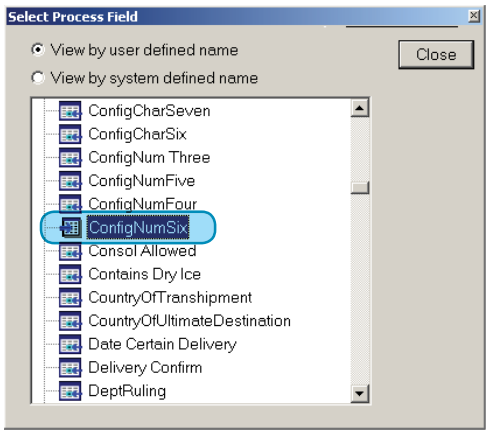
Adding Fields to the Shipping Screen

Before you can process a shipment using manual rates, you need to add the following fields to the shipment processing screen:

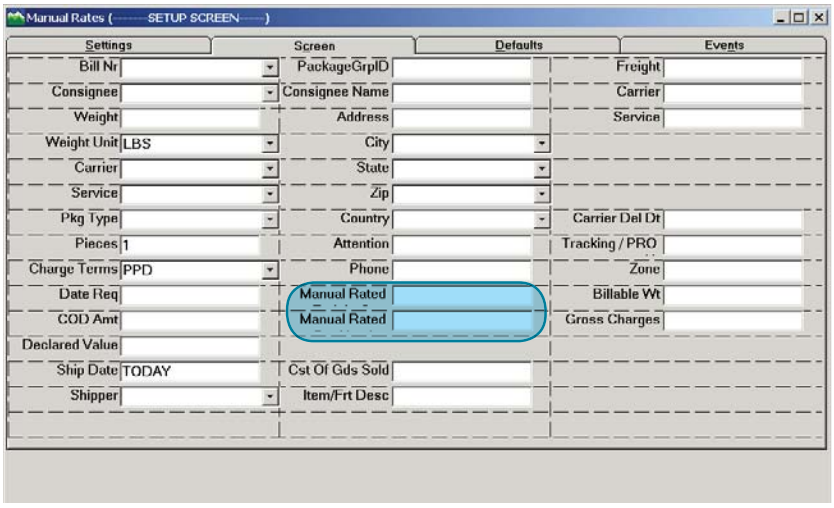
- tblShipmentHeader.ConfigNumSix — Manual Freight
- tblShipmentHeader.PreSpec ProNumber (or ProNumber) — Manual Pro Number

To add fields to the Shipping screen:

1. Click the **Screen** tab.
2. From the **Process** menu, select **Add Field**.



3. Double-click the **tblShipmentHeader** folder.
4. Click and drag **ConfigNumSix** to a location on your screen.
5. Repeat steps 3 and 4 for **PreSpec ProNumber** (or **ProNumber**, depending on if you are viewing by User-Defined or System-Defined name).
6. Change the field labels.
   - ConfignumSix = Manual Rated Freight Cost
   - PreSpec ProNumber = Manual Rated Pro Number



7. Save your changes.

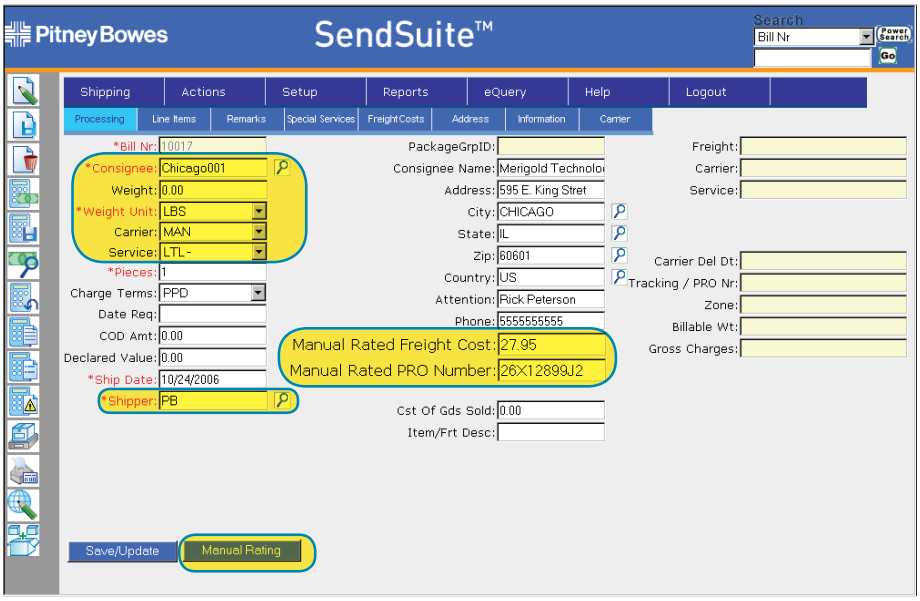
Manual Rating

This allows you to enter any carrier and have the rates associated with the tariff set up for manual rates.

Processing a Shipment Using Manual Rates

To process a shipment using manual rates:

1. In the SendSuite thin-client, open the custom shipping screen you created in the previous section in this chapter.
2. Select or create a shipment.



3. Type the carrier in the **Carrier** field.
4. Select **LTL** from the **Service** drop-down menu.
5. Type an appropriate Shipper in the **Shipper** field.
6. Enter the freight cost in the **Manual Rated Freight Cost** field.
7. Enter the pro number in the **Manual Rated Pro Number** field.
8. Click **Manual Rating** to execute the scripts and other sub-events associated with this processing event.
   - The Carrier ID is set to MAN.
   - The shipment is rated.
   - The tblLoad is updated with the freight cost and pro number.
   - A Bill of Lading will display on screen (if added as a sub-event).
   - The shipment is saved and you are ready to rate another shipment.

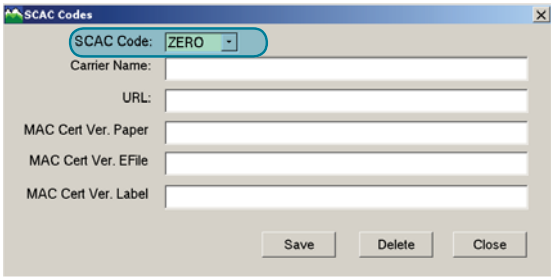
Zero-Rate Carrier

A zero-rate carrier provides a useful way of logging shipments in cases where there are no shipping charges (for example, if you are using your own truck to make a delivery). Follow the below instructions to create your own LTL zero-rated carrier.

Creating the SCAC

To create the SCAC:

1. Open the SendSuite Supporting Data module.
2. Open **Carrier & Labels > SCAC Codes**.
3. Click the **New** button.



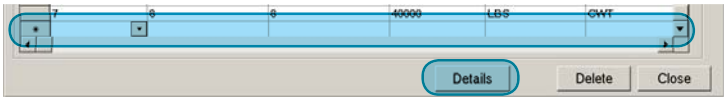
4. Type **ZERO** in the **SCAC** field.
5. Save and close the SCAC setup.

Creating the Tariff

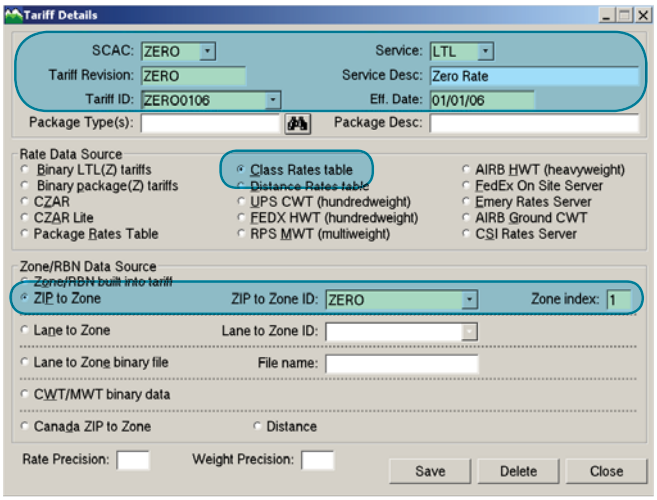
Setting Up the Tariff

To set up the tariff:

1. Open the SendSuite Supporting Data module.
2. Open **Carrier & Labels > Rates > Tariff Setup**.
3. Click the New Record line and click **Details**.



4. Select **ZERO** from the **SCAC** drop-down menu.



Zero-Rate Carrier

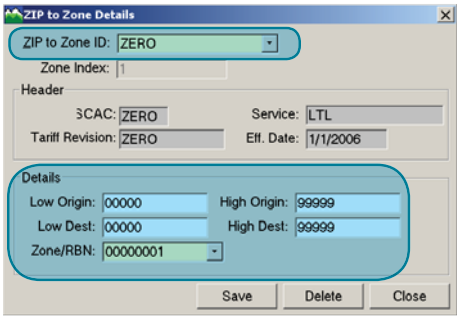
Creating the Tariff

5. Tab to the **Tariff Revision** field and type **ZERO**.
6. Tab to the **Service** field. (The **Tariff ID** field should auto-populate.) Select **LTL** as a service.
7. Type **Zero Rate** in the **Description** field.
8. Set the **Eff. Date** to the beginning of the calendar year (01/01/06).
9. Select **Class Rates table** under **Rate Data Source**.
10. Select **ZIP to Zone** under **Zone/RBN Data Source**.
    a. Type **ZERO** in the **Zip to Zone ID** field.
    b. Type **1** for the **Zone index**.
11. Save and close the Tariff Details screen.

Setting the Zone Details

To set the zone details:

1. On the Tariff Setup screen, select the **ZERO** tariff and click the **Zone/RBN** tab.
2. Click **Details**.
3. Select **ZERO** from the **ZIP to Zone ID** drop-down menu.



4. Type **00000** in the **Low Origin** and **Low Dest.** fields.
5. Type **99999** in the **High Origin** and **High Dest.** fields.
6. Type **00000001** in the Zone/RBN field (this *must* be 8 characters).
7. Save and close the ZIP to Zone Details screen.

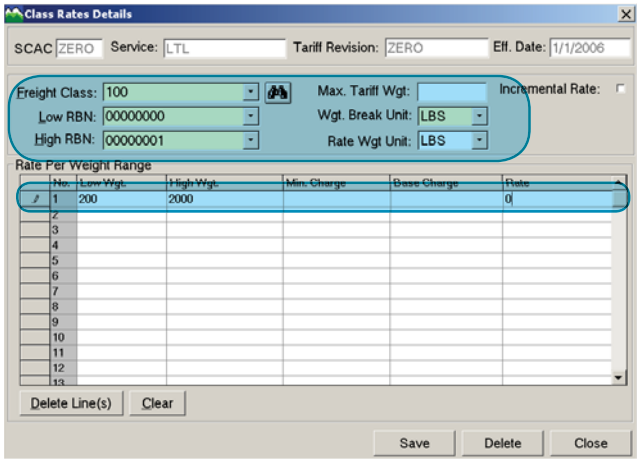
Zero-Rate Carrier

Creating the Tariff

Setting the Class Rates

To set the class rates:

1. On the Tariff Setup screen, click the **Rates** tab.
2. Click **Details**.
3. Select a **Freight Class** to use with the tariff.



4. Type **00000000** in the **Low RBN** field
5. Type **00000001** in the **High RBN** field (this *must* be 8 characters).
6. Select **LBS** as a **Wgt. Break Unit**.
7. Under **Rate Per Weight Range**:
   a. Type a low and high weight in their respective fields.
   b. Type **0** in the **Rate** field.
8. Save and close the Class Rates Details screen.
9. Repeat the above steps (1-8) for every freight class you want to use.
10. Close the Tariff Setup window.

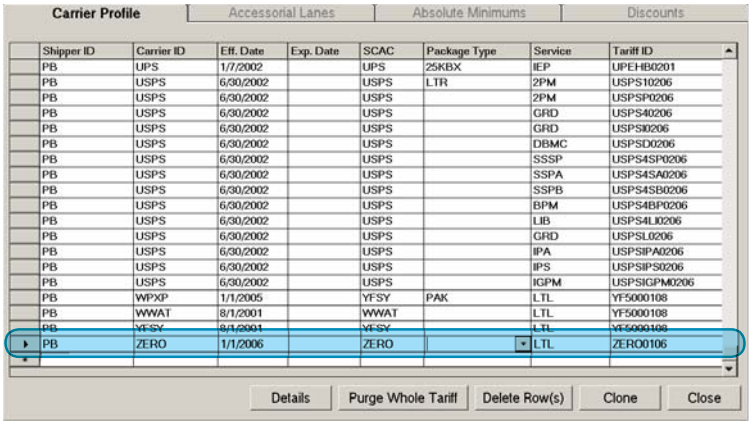
Zero-Rate Carrier

Creating the Tariff

Configuring the Carrier

To configure the carrier:

1. Open **Carrier & Labels > Rates > Carrier Setup**.
2. Go to the New Record line and type in your shipper code.


Carrier Profile
Accessorial Lanes
Absolute Minimums
Discounts
Shipper ID
Carrier ID
Eff. Date
Exp. Date
SCAC
Package Type
Service
Tariff ID
PB UPS 1/7/2002 UPS 25KBX IEP UPEHB0201
PB USPS 6/30/2002 USPS LTR 2PM USPS10206
PB USPS 6/30/2002 USPS 2PM USPSP0206
PB USPS 6/30/2002 USPS GRD USPS40206
PB USPS 6/30/2002 USPS GRD USPSI0206
PB USPS 6/30/2002 USPS DBMC USPSD0206
PB USPS 6/30/2002 USPS SSSP USPS4SP0206
PB USPS 6/30/2002 USPS SSPA USPS4SA0206
PB USPS 6/30/2002 USPS SSPB USPS4SB0206
PB USPS 6/30/2002 USPS BPM USPS4BP0206
PB USPS 6/30/2002 USPS LIB USPS4LI0206
PB USPS 6/30/2002 USPS GRD USPSL0206
PB USPS 6/30/2002 USPS IPA USPSIPA0206
PB USPS 6/30/2002 USPS IPS USPSIPS0206
PB USPS 6/30/2002 USPS IGPM USPSIGPM0206
PB WPXP 1/1/2005 YFSY PAK LTL YF5000108
PB WWAT 8/1/2001 WWAT LTL YF5000108
PB ZERO 1/1/2006 ZERO LTL ZERO0106
Details
Purge Whole Tariff
Delete Row(s)
Clone
Close

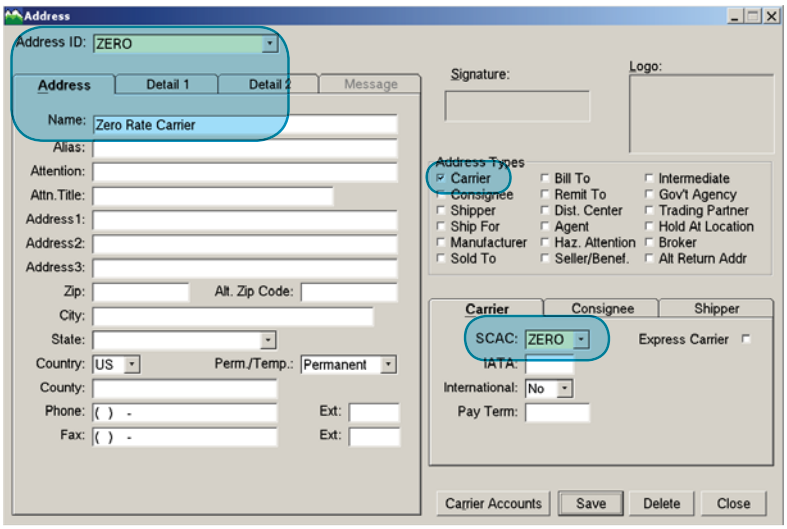
3. Type **ZERO** in the **Carrier ID** field.
4. Set the effective date to the first day of the year (i.e. 01/01/06).
5. Type **ZERO** in the **SCAC** field.
6. Select **LTL** from the **Service** drop-down menu.
7. Select the Zero Tariff ID from the **Tariff ID** drop-down menu.
8. Click **Close**.

Zero-Rate Carrier

Creating an Address Record

To create an address record:

1. Open **Data > Address**.
2. Create a new address record.
3. Type **ZERO** in the Address ID field.



4. Type **Zero Rate Carrier** in the **Name** field.
5. Under **Address Types**, select **Carrier**. (Leave the other options unselected.)
6. Select **ZERO** from the **SCAC** drop-down menu.
7. Save and close the address record.

You can now select the Zero Rate carrier on the shipping screen for LTL shipments. By selecting the Zero Rate carrier, you will record the shipments for logging purposes without applying a charge to them.

7 Labels

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Label Configuration

Label configuration is done in the Supporting Data module. The label definitions that come with the software cannot be changed or deleted. Custom labels can be created by copying the pre-defined label formats and then making changes to the copy.

The SendSuite Client/Server Edition comes pre-defined and loaded with label formats and definitions for three general types (or groupings) of labels:

- **Carrier** — labels required by the carrier to designate the service. Labels are provided for all of the carriers that are supported that require a tracking/address label.
- **Billing** — labels used for consignee billing.
- **Shipper** — labels used to indicate the origin and destination addresses.

The shipper label is the only group that does not come with pre-defined labels. This label group is for custom shipper labels or printing duplicates of the other three types.

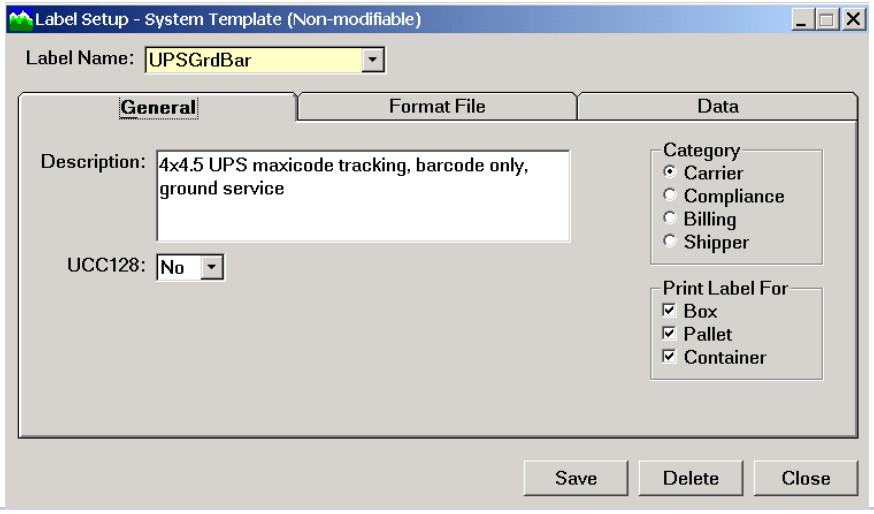
The setup and selection of labels is already defined for carriers when the rates are loaded. The billing and shipper label setup and selection are defined on a case-by-case basis. Carrier labels can be modified as needed.

Label Setup

Label Setup is for defining the category or type of label a format is used for. It is also where the format file is linked to a label definition and where the data elements are defined for a label. An existing label can be used to create a custom label. The label templates supplied cannot be changed.

To set up a label:

1. Open the **Supporting Data** module from the **Control Center**.
2. Double-click the **Carrier & Labels** folder.
3. Double-click the **Labels** folder.
4. Double-click **Label Setup**.



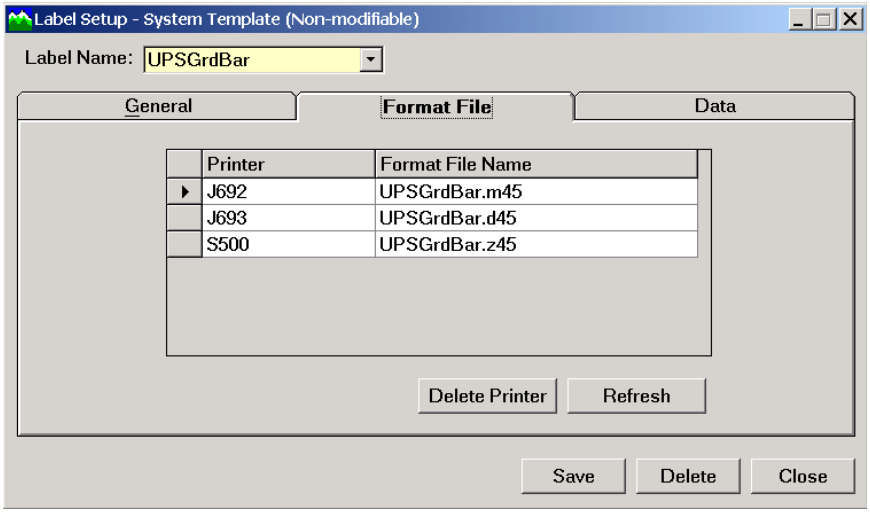
Label Configuration

Label Setup

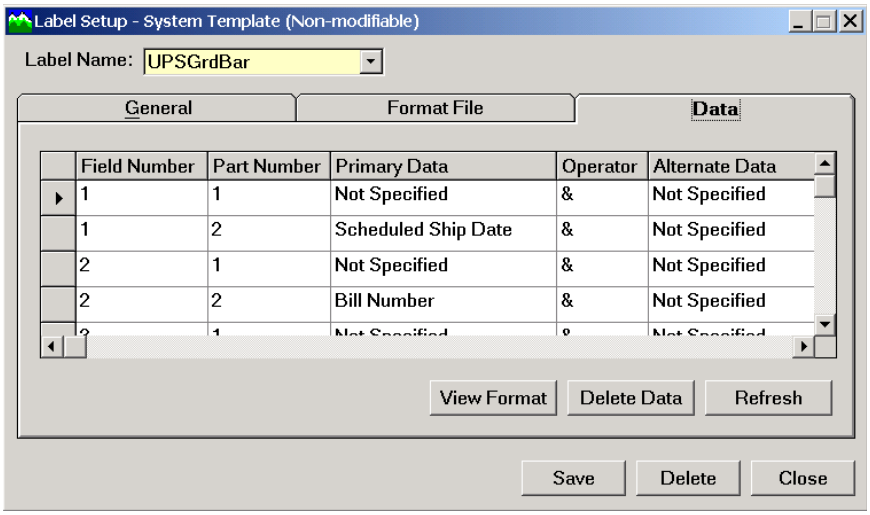
5. The **General** tab displays the label's name, description, and function. Type a name and a brief description for the label.
6. Select the label's function under **Category**.

> **NOTE:** You can make only one selection. If you want to use the same label for other functions, you must create a separate label format.

7. Specify the type of package the label will print for under **Print Label For**.
8. Click the **Format File** tab.



9. Review the available printers and their associated files. Then click the **Data** tab.



Label Configuration

Label Setup

10. Modify as necessary the following fields of the label:

- **Field Number** — Identifies each field.
- **Part Number** — Part number of the label.
- **Primary Data** — Primary SendSuite value to be displayed.
- **Operator** — Defines how the primary data interacts with the alternate data (if any).
- **Alternate Data** — Alternate SendSuite value to be displayed.
- **Data Field Index** — Defines where on the label the fields print. Generally, this should not be changed.
- **Text** — Text appearing *before* any SendSuite data.
- **Start** — Defines where on the label the fields print. Generally, this should not be changed.
- **Length** — Defines the maximum length of the field.
- **Field Type**

11. Click **View Format** at any time to preview the label.



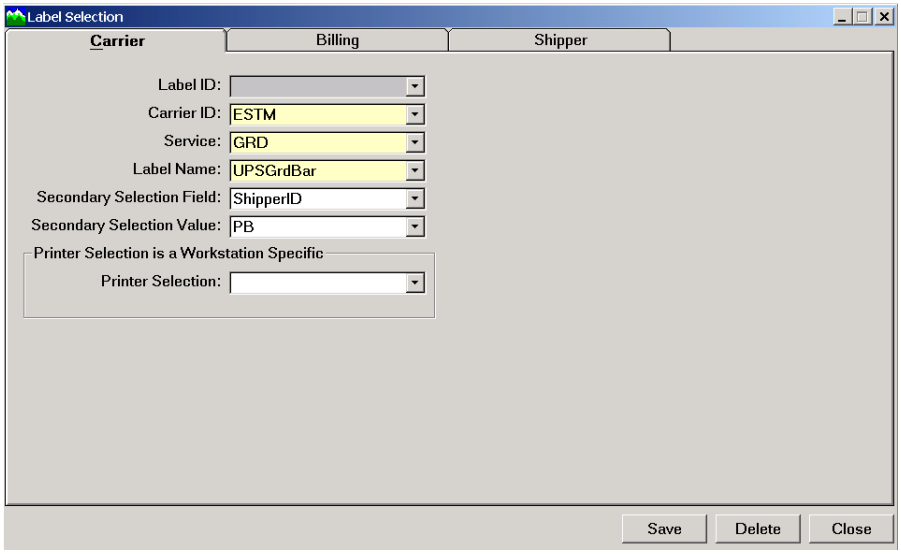
12. **Close** the Label Format Viewer when you are done previewing the label.
13. **Save** and **Close** the Label Setup window when you are done.

Selecting a Label

Once you have labels defined and formatted, you must then tell SendSuite when to use them. Follow the instructions below to select labels for use.

To select a label:

1. Open the **Supporting Data** module from the **Control Center**.
2. Double-click the **Carrier & Labels** folder.
3. Double-click the **Labels** folder.
4. Double-click **Label Selection**.



5. Click the tab for the type of label you are selecting.
6. Click the **Blank Current Form** button.
7. Click the drop-down arrow in the **ID** field and select the carrier, shipper, or trading partner.
8. If you are selecting a carrier label, then click the drop-down arrow in the **Service** field to select the service for the label (e.g., next day, ground).
9. Click the drop-down arrow in the **Label Name** field and select the label format.
10. If you want to use this label only in certain circumstances, then click the drop-down arrow in the **Secondary Selection Field** and select the data field you want SendSuite to look at. For example, you can set up a label that will only be used for collect shipments.
    - Click the drop-down arrow in the **Secondary Selection Value** field and select the specific criteria to apply.
11. Click the drop-down arrow in the **Printer Selection** field and select the printer for this label (optional). If you do not select a printer, SendSuite will print the label on your default label printer.
12. Click **Save**. Note the **Label ID** field automatically populates.

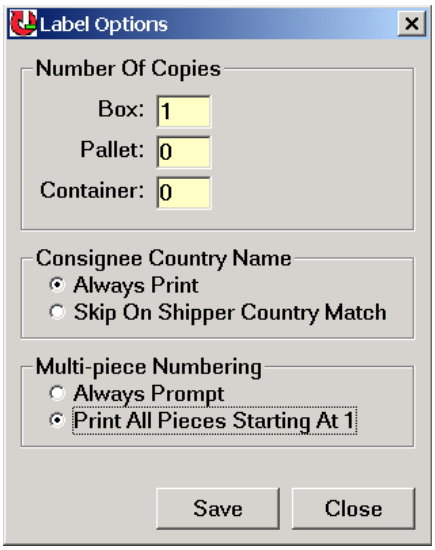
NOTE: If your carrier supports multiple services, you must select a label for each service.

Label Printing Options

You can tell SendSuite how many copies of a label to print and whether to print the consignee's country on the label. These options are set for every workstation using the SendSuite Digital Dashboard.

To select label printing options:

1. Open the SendSuite Digital Dashboard.
2. Click the **Peripheral Setup** button.
3. Click the **Labels** tab.
4. Click **Label Options**.



5. In the **Number of Copies** box, type the number of labels to be printed for each type of packing resource.
6. In the **Consignee Country Name** box, you can tell SendSuite whether to print the consignee's country on the label.

- If you want the country to print only if the shipper and consignee are in different countries, then select Skip On Shipper Country Match.
- If you want the country printed on all labels, then select Always Print.

7. In the **Multi-piece Numbering** box, specify how you want SendSuite to print labels for multiple piece shipments.

- If you want SendSuite to ask the user how many labels to print, then select Always Prompt.
- If you want SendSuite to print labels for all shippable pieces (including boxes on a pallet), then select Print All Pieces Starting At 1.

8. Click **Save**.
9. Click **Close**.

Graphic Labels

SendSuite supports the printing of graphic labels via a laser printer. Graphic label support is available for:

- UPS (excluding UPS Basic)
- FedEx (excluding IEXF-Fedex International Express Freight and IECF-Fedex International Economy Freight)
- DHL
- Golden State Overnight
- OnTrac
- Eastern Connection
- USPS (IOP only)

EXAMPLE: Customers with multiple remote locations with lower volumes of shipping often do not want to purchase a thermal label printer for each location. Most customers, however, typically have access to a laser printer. Graphical label printing will allow customers to print UPS, FedEx and DHL carrier labels to a laser printer. Graphic labels are required for desktop shipping.

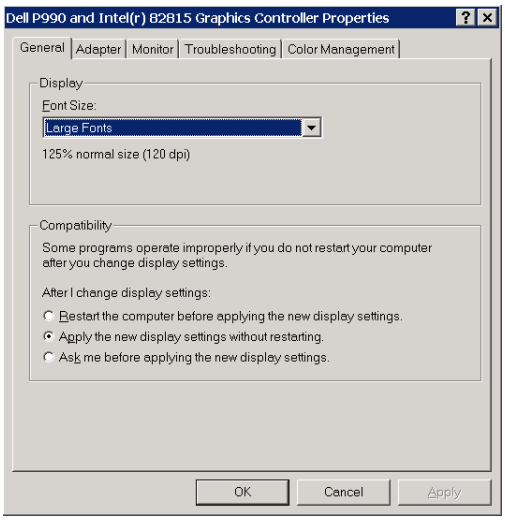
Refer to *SVTS9124* for additional information on graphic labels.

Setting the Windows Font Size

The SendSuite application server must have the Windows fonts set to large.

To set the Windows font size:

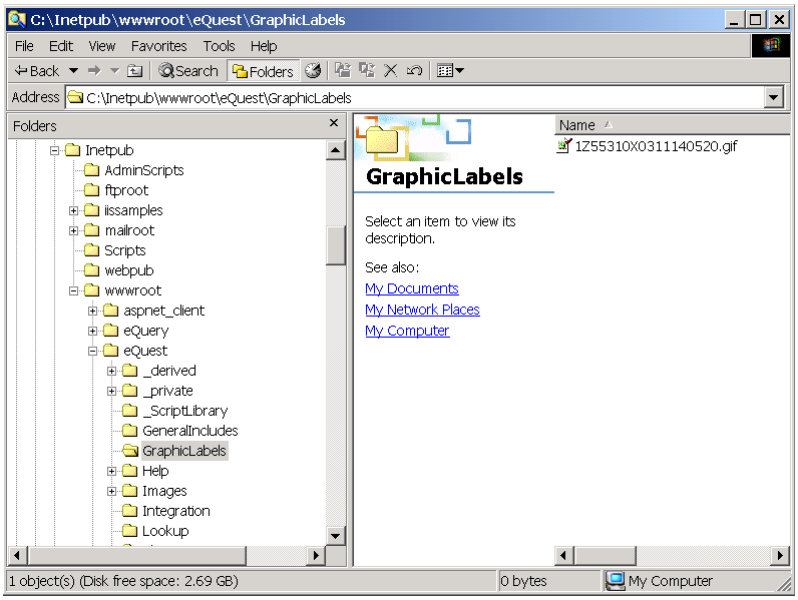
1. Right click the on the desktop, and select **Properties** from the shortcut menu.
2. Go to the **Settings** tab and then click the **Advanced** button.
3. On the **General** tab, select **Large Fonts** from the drop-down menu.



Graphic Labels

DHL and UPS graphical labels are written to the Inetpub\wwwroot\eQuest\GraphicLabels directory as a .gif file. FedEx graphical labels are written to this directory as a .png file. The file name contains the tracking number. For example: 1Z55310X0311140520.gif.

Graphic Label File Information



8 Integration

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Data Mapper

SendSuite can send and receive data from flat ASCII text files using the Data Mapper feature. These transactions usually process information in batch. For example, a host system writes out all the morning's orders to a file at 10:00. SendSuite picks up those orders through the Data Mapper. Once the shipments have been processed, SendSuite writes shipping information to another text file that is picked up by the host system.

Preparation

It is important to review the host file structure and data before creating the Data Map in the SendSuite.

NOTE: A consistent file format is critical for Data Mapper In integration maps. Changes in the file format can cause the import to fail.

To do this:

1. Get a copy of a host file and determine where it will be located
2. Identify the data in the file; i.e. the column headers
3. Identify the data type being brought in; e.g., dates, numbers, characters, etc.
4. Identify the file layout; e.g., comma delimited, tab delimited, etc.
5. Identify the line attributes; e.g., combined header and line records, or separate header and line records, etc.

General Instructions

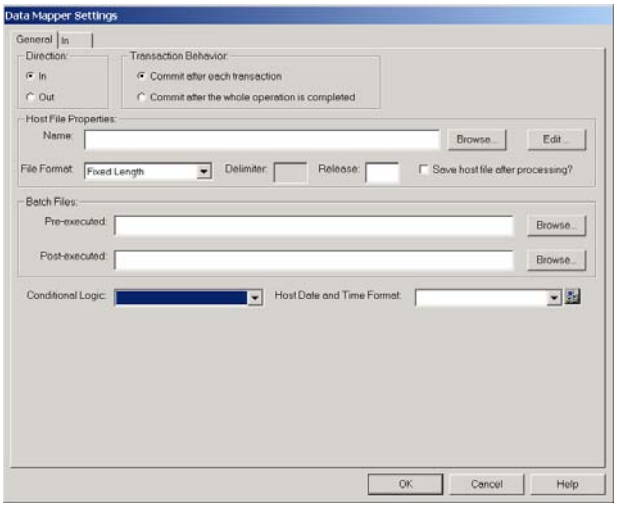
When preparing a data mapper in SendSuite, you will follow this general set of instructions. There is considerable detail when completing these steps, so refer to the pages that follow for more detail.

1. From the **Control Center**, open the **Integration** module.
2. From the **File** menu, select **New**, or click the **New** button.
3. Select **Data Mapper** from the list of file types, the click **OK**.
4. Set the direction the data will flow.
5. Locate the ASCII file that contains the data coming in or going out.
6. Select the view that will be used (this determines the SendSuite tables that can be mapped to or from).
7. Define the host file properties (delimiters, separate or combined lines, etc.)
8. Map the fields.
9. Save the Data Mapper.
10. Run the data mapper from the Integration module, or schedule it to run using the SendSuite **Task Scheduler**.

Data Mapper

Data Map Settings

The **Data Mapper Settings** window appears immediately when you create a new map. To modify the settings for an existing map, select **Map > Change Map Properties**.



General Tab

Direction — Sets the way the data will flow

- In — Data coming into the SendSuite database
- Out — Data going out of SendSuite

Transaction Behavior — This sets when the records will be loaded into the SendSuite database.

- Commit after each transaction — If selected, each record will be written immediately to the database after it is read.
- Commit after the whole operation is completed — If selected, SendSuite will wait until all the records have been read before updating the database.

Host File Properties

- Name — Type the source file for In or the export file for Out (you may also browse for the file—see below).
  - Browse — Click this button to search for the file you want to use.
  - Edit — Click this button to open the file you selected. The file will be opened with Notepad.
- File Format — Select the format that the data is in. If the host file uses a delimiter other than any in the list, select Custom Defined.
- Delimiter — This field is enabled only for Custom Defined formats. Type the character that is used to mark each new field in the host file.

Data Mapper

Data Map Settings

- Release — Type the character that is used to distinguish a character from a delimiter. This field is most commonly used when the host file is comma delimited, but some records in the host file contain commas. The release character precedes the character that is part of the data set. For example, consider the following address record: 10800 Lyndale Ave South, Suite 300, Bloomington, MN, 55420. If you want to read the suite number as part of the address, you need to tell SendSuite to ignore the comma or it will think that information is supposed to go in the next field.

  In this case, the text file should read:

  ```
  10800 Lyndale Ave South/,Suite
  300,Bloomington,MN,55420
  ```

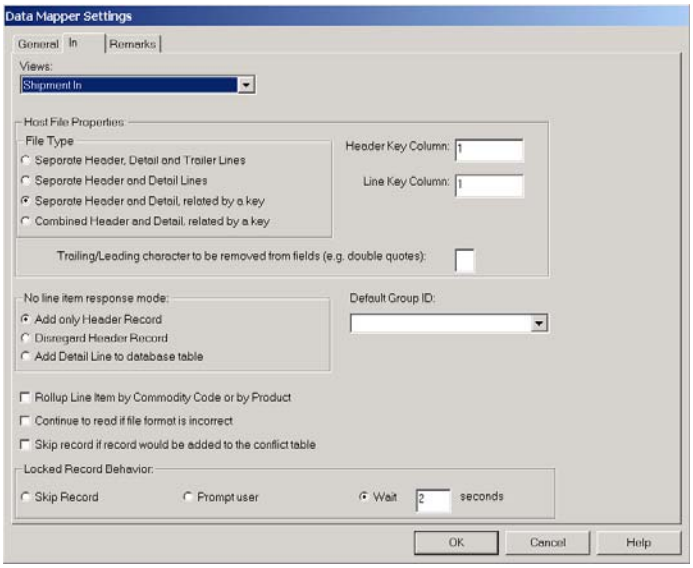
  where the release character is “/”. This preserves the suite number as part of the address record. Without the release, the Data Map would interpret that data as belonging to the next field, making the suite number the city, the city would then be in the state field, the state in the ZIP, and so on.
- Save host file after processing? — You can use this feature to track of the data being received or sent out of the system.

  After SendSuite processes an ASCII document, it renames the document by adding a numeric value to the file extension. For example, if the original file name was Hostdata.txt, SendSuite renames the file Hostdata.txt00. SendSuite will create a maximum of 11 (00-10) files, then it starts over (00).
- Batch Files — Type (or browse) to select an .exe, .com or .bat file to process before or after the mapping.
- Conditional Logic Script — From the drop-down, you can select a Conditional Logic script to run at the time the map is running. The Conditional Logic script will run for each record as it is processed.
- Host Date and Time Format — From the drop-down, you can select a date and time translation.

Data Mapper

Data Map Settings

In Tab



NOTE: When SendSuite imports data into a view, the table the view is based on is also updated.

Views — From the drop-down, select the type of data you will bring into SendSuite. The selection you make determines the database tables and fields you can map to. Once you make a selection and close the setting window, you cannot change your selection.

- **Shipment In** — This will allow you to map data to the following tables or views:

tblCommodity	tblShipmentLine	vCarrier (tblAddress)
tblFreightClass	User Fields	vConsignee (tblAddress)
tblPayorAcct	vAltShipper (tblAddress)	vShipFor (tblAddress
tblShipmentHeader	vBillTo (tblAddress)	vShipper (tblAddress)

- **Supporting Data** — This will allow you to map data to the following tables or views:

tblAccount	tblPackResourceType	vConsignee (tblAddress)
tblCommodity	tblPayorAcct	vDC (tblAddress)
tblCountry	tblProduct	vintermediate (tblAddress)
tblDepartment	User Fields	vRemitTo (tblAddress)
tblDivision	vAgent (tblAddress)	vShipFor (tblAddress)
tblExportLicense	vAltShipper (tblAddress)	vShipper (tblAddress)
tblFreightClass	vBillTo (tblAddress)	vSoldTo (tblAddress)
tblHTS	vCarrier (tblAddress)	

NOTE: If you need to map to tblIntlLine for international shipments, see Mapping to tblIntlLine elsewhere in this chapter.

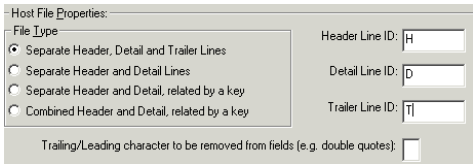
Data Mapper

Data Map Settings

Host File Properties

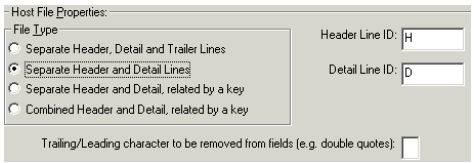
- **File Type** — Specify how the records are organized on the host file. The fields to the right will change based on your selection.
  - **Separate Header, Detail and Trailer Lines** — In this host file, each header record is followed by one or more detail lines. Each line begins with a character that identifies what type of record it is. The last detail record is followed by a trailing record indicating that the first header record has been completed. The next record will be a new header.
  - **Header, Detail, and Trailer Line ID** — In these fields, type the character that identifies the line (see the sample below):

    ```
    H,BILL1234,CONS1234,ADDRESS1
    L,1,PIECE,PRODUCT1
    T,EOF
    ```


Host File Properties:
File Type
Separate Header, Detail and Trailer Lines
Separate Header and Detail Lines
Separate Header and Detail, related by a key
Combined Header and Detail, related by a key
Header Line ID: H
Detail Line ID: D
Trailer Line ID: T
Trailing/Leading character to be removed from fields (e.g. double quotes):

  - **Separate Header and Detail Lines** — In this host file, each header record is followed by one or more detail lines. Each line begins with a character that identifies what type of record it is.

    ```
    H,BILL1234,CONS1234,ADDRESS1
    L,1,PIECE,PRODUCT1
    ```

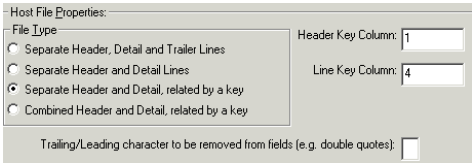

Host File Properties:
File Type
Separate Header, Detail and Trailer Lines
Separate Header and Detail Lines
Separate Header and Detail, related by a key
Combined Header and Detail, related by a key
Header Line ID: H
Detail Line ID: D
Trailing/Leading character to be removed from fields (e.g. double quotes):

Data Mapper

Data Map Settings

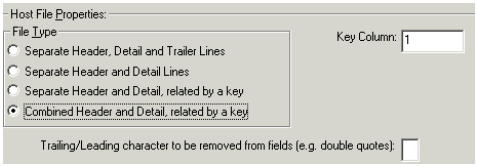
- **Separate Header and Detail, related by a key** — In this host file, each header record is followed by one or more detail lines. The header and detail lines are related by a key, such as an order number.
  - **Header and Line Key Column** — In these fields, type the column number that contains the key that links the lines together. For example, in the example below, the Header Key is 1 and the Line Key is 4:

```
Order123,ConsID456,Address1
4,Pieces,Product1,Order123
```


Host File Properties:
File Type
Separate Header, Detail and Trailer Lines
Separate Header and Detail Lines
Separate Header and Detail, related by a key
Combined Header and Detail, related by a key
Header Key Column: 1
Line Key Column: 4
Trailing/Leading character to be removed from fields (e.g. double quotes):

  - **Combined Header and Detail, related by a key** — In this host file, each record contains both header and detail information. This type of data is used when product or commodity information does not change for each piece shipped (see the example below):

```
Order123,Cons789,Address1,4,Pieces
```


Host File Properties:
File Type
Separate Header, Detail and Trailer Lines
Separate Header and Detail Lines
Separate Header and Detail, related by a key
Combined Header and Detail, related by a key
Key Column: 1
Trailing/Leading character to be removed from fields (e.g. double quotes):

- **Trailing/Leading character to be removed from fields (e.g. double quotes)** — If the lines have some character at the beginning or the end, then you indicate what that is in this field. For example, some host systems place double quotes (“) at the beginning and end of each line. SendSuite will strip those off if you type the double quotes in this field.

Default Group ID — Only enabled when Shipment In is selected, you can type or select a Group ID to which all shipments will be assigned.

No line item response mode — If SendSuite is expecting a line item for each header, your selection here will determine what the system should do if there is no line item.

- Add only Header Record — This will add only the header record, leaving a line blank.
- Disregard Header Record — This will skip that record and go on to the next.
- Add Detail Line to database table — This will add the header record and create a dummy line record as well.

Data Mapper

Data Map Settings

Rollup Line Item by Commodity Code or by Product — By default, SendSuite Shipping will add each tblOrderLine or tblShipmentLine as a separate record. If you check this box, SendSuite will consolidate multiple lines where the commodity or product code is the same.

For example, SendSuite Shipping will create one line with 7 pieces from a host file with the following lines:

Pieces	Commodity
5	123456
2	123456

Skip record if record would be added to the conflict table — SendSuite Shipping will not overwrite or update existing records in the database. Instead, duplicate records are added to tblShipmentHeaderConflict.

If you select this box, SendSuite Shipping will skip the duplicate record and it will not add it to the database.

You can also control this behavior by setting the SendSuite Table properties (see SendSuite Table Properties In in the next section of this chapter).

Locked Record Behavior — Records are locked when they are in use by another application or user. If SendSuite encounters a locked record, your selection here determines what the system will do:

- **Skip Record** — The record is skipped and not added to the database
- **Prompt User** — SendSuite will prompt the user to take action.
- **Wait** — The system will retry after waiting the number of seconds you specify. If the record is still locked, the system will wait again until the record is unlocked.

Data Mapper

Data Map Settings

SendSuite Table Properties In

When importing data into SendSuite, you can tell the system what to do if it finds an existing record in the database. You can set different properties for different tables. For example, you can set the properties for tblShipmentHeader to Update, and set the properties for tblShipmentLine to Replace.

To set the table properties:

1. Left-click on the SendSuite table, then right-click on the table and select **Table Properties**.
2. Choose the radio-dial button next to the **Duplicate Record** behavior you want.

- **Skip Record** — The information in the record being imported is not loaded into the SendSuite database.
- **Update Record** — Any new information on the record being imported is saved in the SendSuite database. Fields that have not changed are left alone.
- **Replace Record** — The record being imported overwrites the existing record in the database. If you set this behavior on tblShipmentHeader, it will rewrite all the tblShipmentLine records as well.
- **Prompt User** — If the mapper encounters an existing record, the user will be given a choice whether to replace the existing record, update the existing record, delete the existing record (see below), or skip the incoming record.
- **Delete Record** — This deletes the existing record and does not import the new record.

3. Click **OK**.

Data Mapper

Data Map Settings

Out Tab

Views — From the drop-down, select the type of data you will send out of SendSuite. The selection you make determines the database tables and fields you can map from. Once you make a selection and close the setting window, you cannot change your selection.

- **Shipment Consolidated Costs** — This will allow you to map data out from the following tables or views:

tblLoad
tblShipmentHeader
tblStop
vConsolidatedCosts

- **Shipment Costs** — This will allow you to map data out from the following tables or views:

tblCost
tblLoad
tblShipmentHeader
tblStop

- **Shipment Out** — This will allow you to map data out from the following tables or views:

tblCost
tblLoad
tblShipmentHeader
tblShipmentLine
tblStop
vBillTo
vConsignee

Update UPLOADED flag — By checking this box, SendSuite Shipping will add the current date to ***tblShipmentHeader.Uploaded***.

If Host File exists — If the file name you are writing to already exists, your must tell SendSuite what to do with the new data.

- **Append** — This will add the new data to the existing data in the file.
- **Overwrite** — This will rewrite the file with only the new data. The previous data in the file will be lost.
- **Abort Upload** — This will stop the transfer of data out of SendSuite.
- **Prompt** — This will notify the user that the file already exists and ask the user which action to perform. The user can choose to Overwrite the file, Append the file, or abort the mapper by clicking the **Cancel** button.

Data Mapper

Data Map Settings

Host File Properties — Using these fields, you must tell SendSuite Shipping how to write the data out.

- **Combine header and detail lines** — If you select this box, SendSuite Shipping will write out the header and line information on one line.

  If you leave this box unchecked, then SendSuite will write out separate header and detail lines. If you do this, then you must indicate how the header and detail lines are related.

- **Line Identification** — What you type in these fields will appear at the beginning of every line. If you leave a field blank, SendSuite will not put a character at the front of the line. For example, if you want the bill number in the first column, then leave this field blank. You might get something like this:

  ```
  BILL789,FEDX,NAM,111545541,23.04
  BILL963,YFSY,LTL,9854545,378.53
  ```

  If you did not check the Combine box, then you can use these fields to distinguish header and detail lines. For example, if you type H in the Load/Stop/Shipment Header field and D in the Shipment Detail Line ID field, then your file might look something like this:

  ```
  H,BILL123,FEDX,GRD,1165245412
  D,1,5.235,0,1
  H,BILL345,YFST,LTL,9825652
  D,52,1053,2,1
  ```

- **Trailing/Leading character to be added to fields (e.g. double quotes)** — If you need to add leading or trailing characters to the line written out by SendSuite Shipping, type that character in this field.

Data Mapper

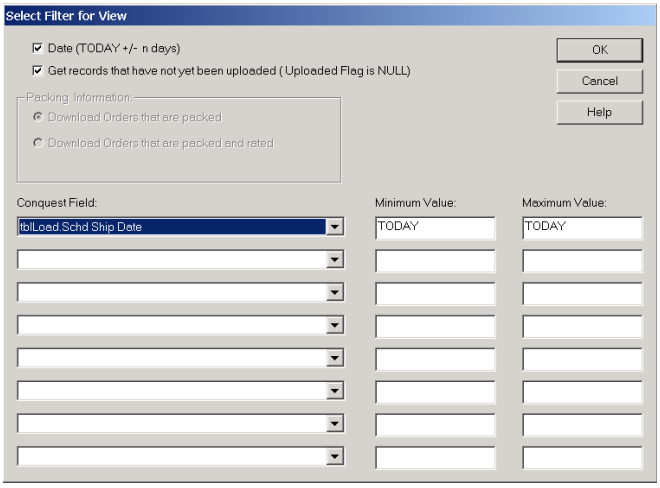
Data Map Settings

Filtering Records

When you are sending data out of SendSuite Shipping to an ASCII file, you can select which records are sent out. Using a filter queries only a portion of the database while unfiltered searches query the entire database. Filters can significantly improve performance on large databases.

To filter records:

1. From the **Map** menu, select **View Filter**.
2. Setup your criteria using the check-boxes and Conquest Fields (see below).
3. Click **OK**.



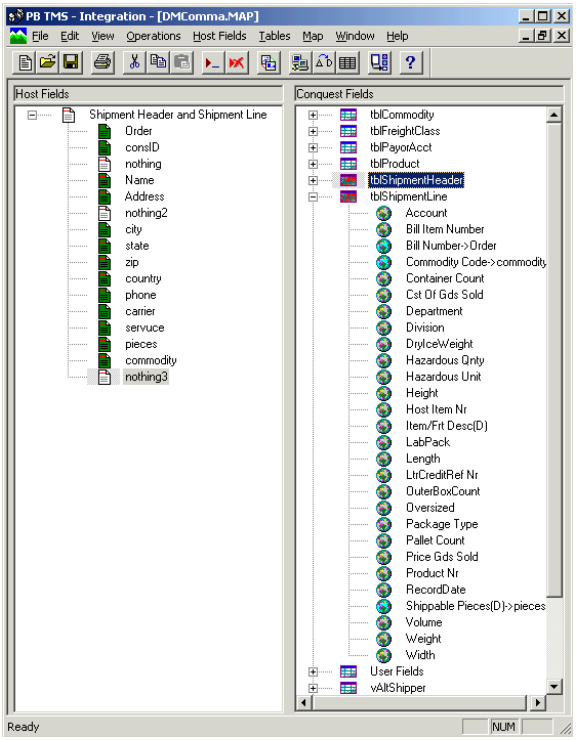
- **Date (TODAY +/- n days)** — If you want to select record using a relative date, then check this box. Then, in the **Conquest Field**, you must select a date field. The input mask on the **Minimum** and **Maximum** value fields will change from data entry to TODAY. This will select only records with today's date.

  To select a range of dates, type an operator then a number. For example, if you want the system to select all the shipments with an ActualShipDate in the last week, then set the minimum value to TODAY-7.

- **Get records that have not yet been uploaded (Uploaded Flag is NULL)** — By checking this box, SendSuite will only write out records where ***tblShipmentHeader.Uploaded*** in NULL. This can be used very effectively with the Update Uploaded flag (see Out Tab elsewhere in this chapter).

Data Mapper

Mapping the Fields



Adding Host Fields

New Map

When creating a map for the first time, the first thing you must do is define the fields on the ASCII file. See the example on page 8-15 for a line of sample data along with each element's corresponding field.

To add host fields:

1. From the **Host Fields** menu, select **Add a Host Field**.
2. Type the name you want to use for the host field in the **Name** field.
3. Modify the properties for the field. (See Host Field Properties — In, in the next section of this chapter.)
4. Click **Add**
5. Repeat these steps until all the fields have been added

NOTE: You must identify all the fields on the data file, regardless of whether you will map them.

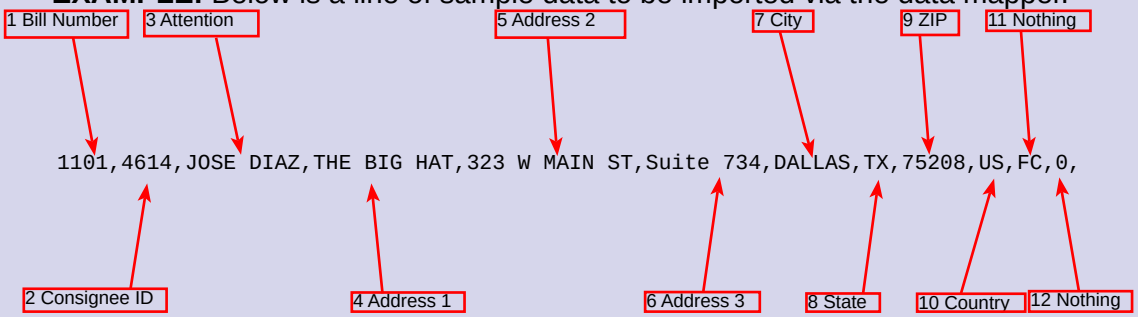
Existing Map

If you are adding host fields to an existing map, click on the existing field that the new field will follow, then select **Host Fields** > **Add a Host field**.

Data Mapper

Mapping the Fields

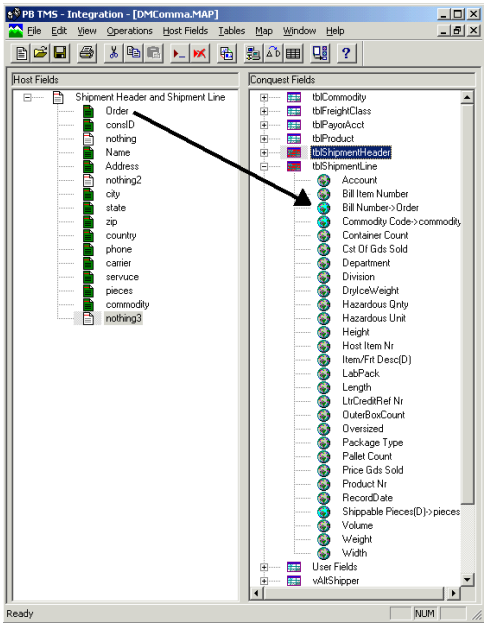
EXAMPLE: Below is a line of sample data to be imported via the data mapper.



Mapping Fields

To map the fields, begin by expanding your host records. Then expand the SendSuite table to which you will map the data.

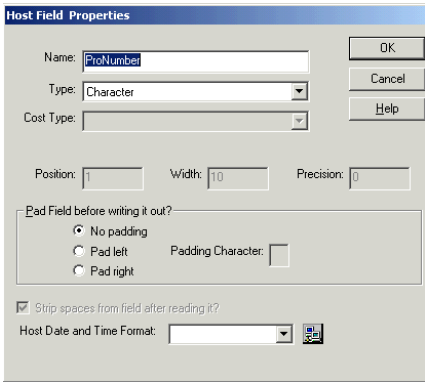
To map a field, click and drag the host field onto the SendSuite (Conquest) field. If you mapped the field successfully, the host field icon and the SendSuite field icon change color. Also, in the SendSuite pane, the host field name appears next to the SendSuite field name.



Data Mapper

Host Field Properties — In

To define the host field properties, left-click on the host field, then right-click on the field. Select **Edit** from the popup menu.



Name — This field contains the host field name.

Type — This field identifies the data type in this field; e.g., character, number, date or time.

Cost Type — This field is not used.

Field position — The following fields are only enabled when the data on the host file is in a fixed length format. You use these fields to tell SendSuite where the data is in on the file. Refer to the following example:

```
12345678901234567890123456789012345678901234567890123456789012345678901234567890123
BILL456      CONSID123      AUTOMOTIVE REPAIR SPECIALISTS   123 MAIN ST
BILL789      CONS753        JOES AUTOBODY                   4 N 8TH
```

- **Position** — Type the number of the column where the data starts. F or example, the consignee names above start at column 23.
- **Width** — Indicate how many characters might be in that field. For example, the consignee ID field above contains up to 10 characters
- **Precision** — Defines how many decimal places a field uses.

Strip spaces from field after reading it? — This is checked by default and it will remove any blank space from a field. This can be useful if the host system always outputs the maximum number of character for a field, padding the data with spaces.

Host Field Properties — Out

To define the host field properties, left-click on the host tag, then right-click on the tag. Select **Edit** from the popup menu.

All the properties are the same as what is shown in Host Field Properties — In (in the previous section of this chapter) with the following difference:

Pad field before writing it out? — Using these radio-dial buttons, you can add characters to the left or the right of the data you are sending back to the host. For example, if SendSuite is sending back “Dave” but the host system expects 10 characters, you can pad right so SendSuite actually sends back “Dave000000”. Type the character to use for padding in the **Padding Character** field.

Data Mapper

SendSuite Shipping Field Properties

To define the SendSuite Shipping field properties, left-click on the SendSuite field, then right-click on the field name. Select **Field Properties** from the popup menu.

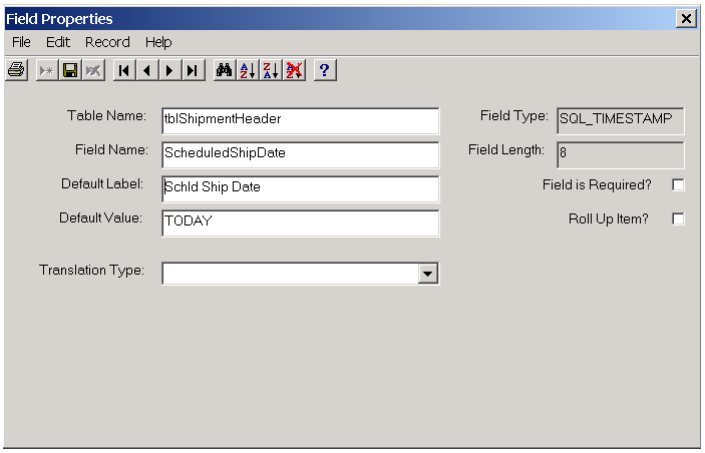


Table Name — This identifies the SendSuite table that this is on.

Field Name — This identified the field name on the SendSuite table.

Default Label — This is the name of the field as it shows in the mapping tree.

Default Value — If the value being transferred is NULL, SendSuite Shipping will use the default value. The data input must match the **Field Type**. To use the current date, type **TODAY** (this must be in caps).

Translation Type — If the host and SendSuite Shipping use different values, then you can set up a translation. Once the translation has been defined, then you can select that translation from the drop-down here.

Field Type — This identifies the type of data expected by SendSuite Shipping.

Field Length — This identifies the maximum number of characters that the SendSuite Shipping database will accept for this field.

Field is Required? — If checked, SendSuite Shipping will require a value for this field. If no value is sent to SendSuite Shipping, the system will return an error.

Roll Up Item? — This field applies when multiple line items are being sent to SendSuite Shipping. If checked, SendSuite Shipping will summarize all the line items into a single line.

Data Mapper

Mapping to tblIntlLine

If you need to map date to ***tblIntlLine***, you must set up a separate Data Mapper for that data. You must execute that Data Mapper separately from the Data Mapper bringing in the header information. The following section explains how to set up and run this separate Data Mapper.

Considerations for Data on the Host File

First, for the purposes of international documentation, you must first determine the contents of each box being shipped. This data can then be imported via the data mapper and printed on any required documents.

The data mapper will create lines on ***tblIntlLine*** based on the **PackageID** field. SendSuite automatically generates this number. If you map to this field, SendSuite will rewrite the field value. For example, if you have box numbers 235, 236, and 237 on your host file and map these to tblIntlLine.PackageID, after the data mapper runs you will see 1, 2, and 3 in the PackageID field.

SendSuite determines whether to create a new PackageID whenever it encounters a *change* in **BillItemNr**. In the example below, the host file contains three lines, but only two box IDs. However, the box IDs are not grouped together, so SendSuite creates three PackageIDs because it sees three changes:

Host Product Number	Host Box ID	SendSuite Package ID
P123	458	1
P124	459	2
P125	458	3

This means that the host file must arrange the data by PackageID. The correct arrangement for this example would be:

Host Product Number	Host Box ID	SendSuite Package ID
P123	458	1
P125	458	1
P124	459	2

Data Mapper

Mapping to tblIntlLine

Shipment Header Map

The first map is set up to bring data into tblShipmentHeader and tblShipmentLine. The two tables are related by the **BillNr** field, in a one to many relationship. You can create multiple records on ***tblShipmentHeader***.

When running the second mapper to bring information into ***tblIntlLine***, SendSuite will recreate all the ***tblShipmentLine*** necessary. To make sure that you do not end up with duplicate records on tblShipmentLine, you must set the SendSuite table properties to “Replace”. See SendSuite Table Properties In, elsewhere in this chapter.

You *must* set a value for ***tblShipmentLine.HostItemNr***. You can map up to four number in this field, or you can set a default value.

International Detail Line Map

The setup of the tblIntlLine Data Mapper follows the same general process described in *General Instructions* on page 8-3.

When choosing the view, select **Shipment Line Detail In**.

Add the host fields, following the instructions for *Adding Host Fields*, elsewhere in this chapter.

Data Mapper

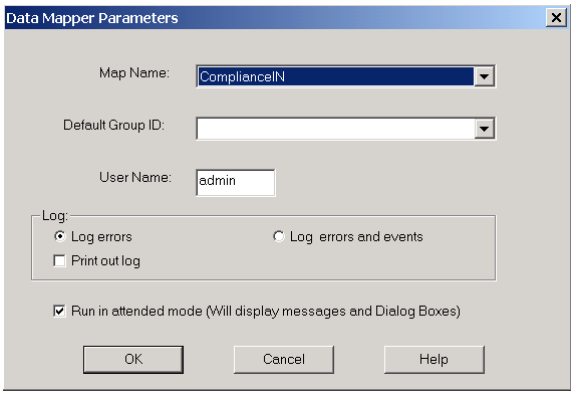
Running Data Mapper

Data Mapper can be run manually from the **Integration** module. It also can be run automatically in **Task Scheduler**. (To run the data mapper from Task Scheduler, see *Task Scheduler* in Chapter 5.)

1. From the **Operations** menu, select **Run Data Mapper**

   - OR -

   Click the **Run Data Mapper** button. 



2. On the **Data Mapper Parameters** window, select the mapper you want to run from the **Map Name** drop-down.
3. For **Data Mapper In** *only*, you can select a planning group to assign the shipments to.
   - You can type an existing group in the **Default Group ID** field
   - You can select **NOW** from the **Default Group ID** drop-down. This will create a new group using the current date and time. For example, if you select **NOW** on July 14, 2005 at 3:52 PM, the SendSuite will create a group called `200507141532`.
   - You can select **TODAY** from the **Default Group ID** drop-down. This will create a new group using the current date and time. For example, if you select **TODAY** on July 14, 2005 at 3:52 PM, the SendSuite will create a group called `20050714`.
   - If you do not make a selection, you will be prompted for a group again later. If you did make a selection, you will not be prompted twice.

Data Mapper

Running Data Mapper

4. Make a selection about how SendSuite should log the data
   - **Log errors** — This is the default and it will only write errors to the SendSuite activity log.
   - **Log errors and events** — This will write errors and events to the SendSuite activity log.
   - **Print out log** — If you check this box, the system will print the log once the data mapper has finished running.
5. **Run in attended mode (Will display messages and Dialog Boxes)** — This box is checked by default and it will display any error messages as the data mapper runs. It also will display a summary when the data mapper is done.

   If you remove the check, then the data mapper runs unattended, and it does not display a summary when complete. When running in this mode, it is a good idea to check the **Print out log** box.

   Leave this unchecked to run maps from the Task Scheduler.
6. Click **OK**.

Creating a DSN

A data source is a flat file, relational or other database on a remote computer. The data source consists of the data that the user wants to access and its associated operating system, DBMS (database management system) and network platform (if any) used to access the DBMS.

Database vendors provide drivers which implement the specific interfaces with their database system. Users then use the ODBC Data Source Administrator (from the Control Panel) to provide logical names for data sources. Applications can then do their work without knowing any of the particulars of the database system being used. This allows all applications to work with databases on a wide variety of platforms.

The ODBC Administrator is installed when Windows® is installed. The ODBC Administrator manages the ODBC drivers present on a system. When the ODBC Administrator receives SQL statements from the application, it directs them to the appropriate ODBC driver.

The ODBC driver then processes the SQL statements and gives them the appropriate DBMS to execute. For example, if the intended ODBC data source is a Microsoft Access database, the ODBC Administrator sends the SQL statements to the Microsoft Access ODBC driver. The Access driver then processes the SQL statements and interfaces with the Access database.

To use a data source, you must configure the data source in the ODBC Administrator. You must also install the appropriate ODBC driver. This lesson provides procedures to configure the data source in the ODBC Administrator.

Before setting up the ODBC Data Exchange, the following steps must be completed:

- Verify that the host application is installed.
- Verify that the ODBC Driver for the target database is installed.
- Create a Data Source Name.

Creating a DSN

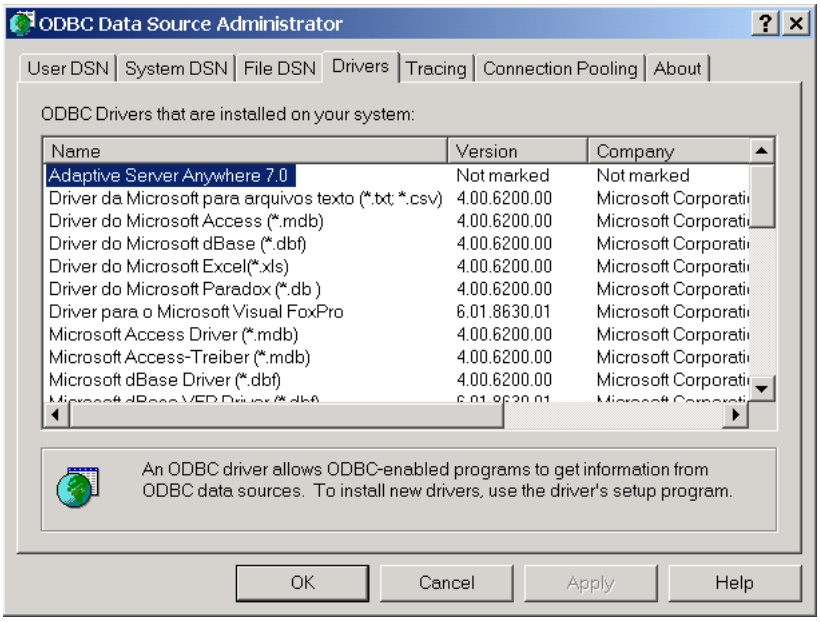
Verifying that the ODBC Driver for Database Is Installed

NOTE: The ODBC Data Source Administrator dialog box shows the different data sources and their ODBC drivers. These data sources can be used to connect to DBMS.

NOTE: If the correct driver is not loaded, use the driver's setup program to install the driver. It is the responsibility of the MIS Administrator at the Customer Site to ensure that the correct driver is installed.

To verify that the ODBC driver is installed:

1. From the Windows® Start menu, select **Settings**.
2. From the **Settings** menu, select **Control Panel**.
3. From the **Control Panel**, double-click the **Administrative Tools** icon.
4. Double click the **Data Sources (ODBC)** icon.
5. Click the **Drivers** tab to display a list of drivers (and the specific version).



6. Click **OK** to exit.
7. From the **File** menu, select **Close** to close **Control Panel**.

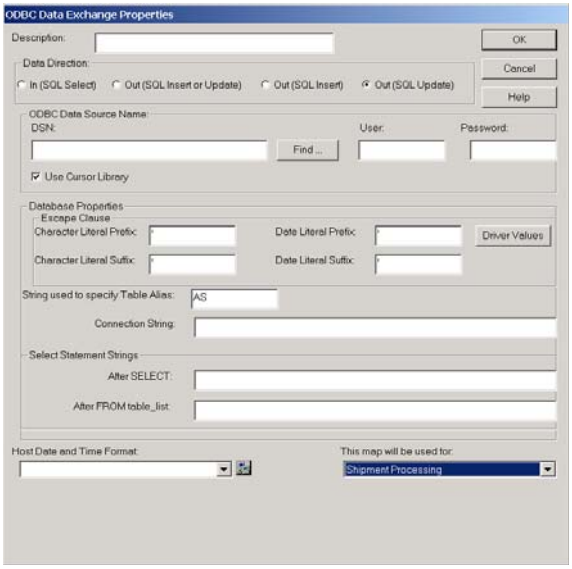
Creating a DSN

A DSN is created using Microsoft tools. You can access these tools through the Control Panel, or you can access the tools through the integration module in SendSuite.

Creating the Data Source

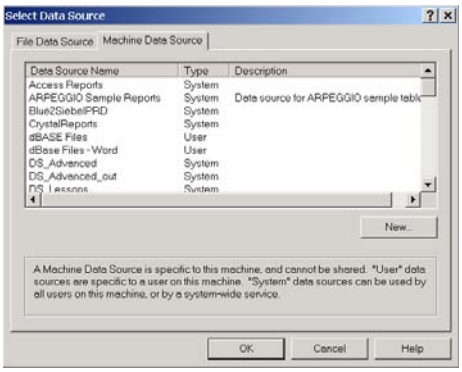
To create the DSN from within SendSuite Shipping:

1. From the **Control Center**, open the **Integration Module**.
2. From the **File** menu, select **New**.
3. Select **ODBC Data Exchange** and click **OK**.



NOTE: A Machine Data Source is specific to the machine and cannot be shared. User Data Sources are specific to a user on the machine. System Data Sources can be used by all users on the machine, or by a system-wide service.

4. Enter a descriptive name for the ODBC Data Exchange Map.
5. Click **Find** under **ODBC Data Source Name**.

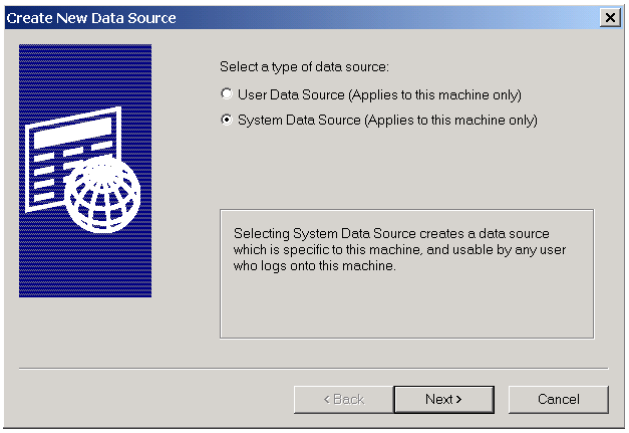


6. From the **Select Data Source** dialog box, click the **Machine Data Source** tab.

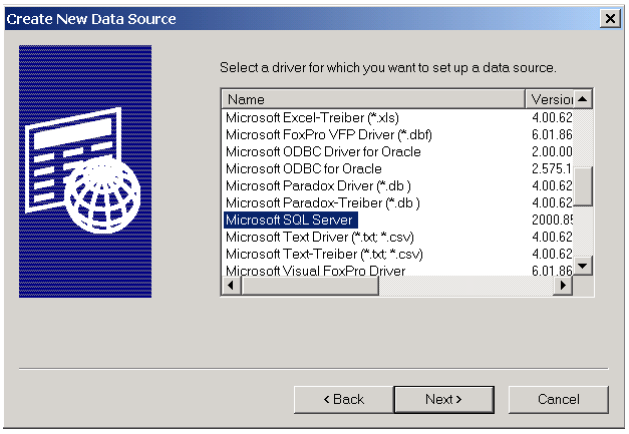
Creating a DSN

Creating the Data Source

7. Click **New**.


Create New Data Source
Select a type of data source:
User Data Source (Applies to this machine only)
System Data Source (Applies to this machine only)
Selecting System Data Source creates a data source which is specific to this machine, and usable by any user who logs onto this machine.
< Back
Next >
Cancel

8. From the **Create New Data Source** dialog box, select **System Data Source** and click **Next**.


Create New Data Source
Select a driver for which you want to set up a data source.
Name
Version
Microsoft Excel-Treiber (*.xls) 4.00.62
Microsoft FoxPro VFP Driver (*.dbf) 6.01.86
Microsoft ODBC Driver for Oracle 2.00.00
Microsoft ODBC for Oracle 2.575.1
Microsoft Paradox Driver (*.db) 4.00.62
Microsoft Paradox-Treiber (*.db) 4.00.62
Microsoft SQL Server 2000.85
Microsoft Text Driver (*.txt; *.csv) 4.00.62
Microsoft Text-Treiber (*.txt; *.csv) 4.00.62
Microsoft Visual FoxPro Driver 6.01.86
< Back
Next >
Cancel

NOTE: The DSN setup from this point will vary by the driver chosen.

9. Select the ODBC driver to use. Be certain to select the right driver for the database you are using. The driver you use should match the database type.
10. Once you have named the DSN and selected the database, you will return to the SendSuite **ODBC Data Exchange Properties** window.

ODBC Integration in SendSuite Shipping

Preparing for Integration

Open Database Connectivity (ODBC) is possible with SendSuite. This method of integration requires a valid and updated driver for the host database. (See *Verifying that the ODBC Driver for Database is Installed*, elsewhere in this chapter.)

The fundamental principle of ODBC is that each database talks directly to the other database using the ODBC driver. A database can add or update records on the other database. One advantage of using ODBC is the real-time exchange of data between databases. For example, when Data Mapping is used, records are downloaded and uploaded in batch, meaning that they sit idle for some period of time. On the other hand, when an ODBC call is made, the data is taken from one database and written to the other immediately.

You should review the host database before beginning the integration. When you look at the host database, write down the names of the tables that you will be using. Open the tables and write down the names of the fields that contain the data you will bring into SendSuite as well as the names of the fields you will write information to on the host.

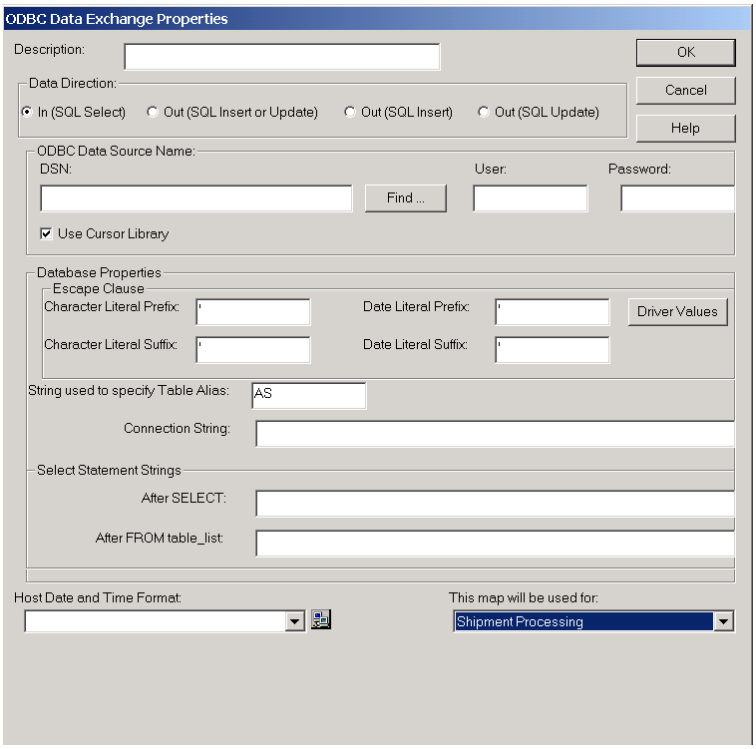
> **NOTE:** While you are using the SendSuite integration tools, you have a live connection to the host database. This may lock other users out of the database.

ODBC Integration in SendSuite Shipping

Creating a New ODBC Map

To set up a new ODBC map, open the **Integration** module from the **Control Center**.

When you select **File** > **New**, and select **ODBC Data Exchange**, the **ODBC Data Exchange Properties** window will open.



Description — (required) Type a description of the data exchange in this field.

Data Direction — Select the direction and behavior of the data exchange.

- **In (SQL Select)** — This will bring information into SendSuite.
- **Out (SQL Insert or Update)** — This will send information back to the host database. You can either add new records to the host database or you can change existing records.
- **Out (SQL Insert)** — This will send information back to the host database, but it will only insert new records; it will not update existing records in the host db.
- **Out (SQL Update)** — This will send information back to the host database, but it will only update existing records; it will not insert new records into the host db.

ODBC Integration in SendSuite Shipping

Creating a New ODBC Map

ODBC Data Source Name — You can type the DSN in this field or you can click the Find button and browse for the DSN. If the DSN has not already been set up, you can click the Find button and use the Windows wizards to create a new DSN. For further instruction on how to create a new DSN, See *Creating a DSN* elsewhere in this chapter.

- **User** — If the host DB requires a user login, then type that in this field.
- **Password** — If the user ID requires a password, type that in this field.
- **Use Cursor Library** — Use this checkbox to specify whether to use the cursor library for the data source. Deselecting this checkbox may resolve some ODBC problems. See Microsoft's website for more information on cursor libraries.

Database Properties — Use the fields in this box to define additional information about the data in the host DB.

- ☐ **Escape Clause (ODBC Driver Database Properties)** — Some data in the host file may look like a wildcard character to the SQL statement. Different ODBC drivers use different symbols as wildcards. Click **Driver Values** to query the driver for the wildcard symbols.

  EXAMPLE: If a date value must be imported literally and not translated, the an escape character may precede and follow the value; for example, #05/21/05!. Use the **Prefix** and **Suffix** fields to specify these escape characters.

- ☐ **String used to specify Table Alias** — If you are referring to table aliases instead of the actual table names, type the characters that are used to indicate that the table is an alias. For example, if you are connecting to a table called “CustomerTableHeader” but you want to refer to it as “CH”, then you may need to type “Alias” in this field in order to connect to the correct table.

- ☐ **Connection String** — Type any additional connection information in this field. For example, if you want to set a 3-second timeout on a MS SQL database, you can type “TIMEOUT=3000” in this field.

Select Statement Strings — The ODBC map will create a SQL Select statement to gather the information it needs. You cannot alter the SQL statements SendSuite creates, but you can add a statement after the Select and From statements using these fields. For example, if you want to use a SELECT DISTINCT statement, type DISTINCT in this field.

Host Date and Time Format — From the drop-down, you can select a date and time translation.

ODBC Integration in SendSuite Shipping

Creating a New ODBC Map

This map will be used for — From the drop-down, select **Shipment Processing** (the only view available). Once you make a selection and close the setting window, you cannot change your selection.

- **Shipment Processing** — This will allow you to map data to the following tables or views:

ProcessMemory	tblShipmentLine	vBillTo
tblCost	tblStop	vCarrier
tblLoad	tblSwog	vConsignee
tblShipmentHeader	vAltShipper	vShipFor
		vShipper

ODBC Integration in SendSuite Shipping

There is an additional toolbar that can be used with the ODBC mapping feature in SendSuite. To add the toolbar to the screen, select **View** > **ODBC Data Exchange Toolbar**. You can move the toolbar anywhere on the screen, including docking it next to the standard integration toolbar.



ODBC Toolbar



ODBC Data Exchange Properties — This opens the Data Exchange Properties window.



Add Host Tables — This opens the host database and displays its tables.



Edit Selection Criteria — See below.



Show SQL Statement — See below.



Execute SQL Statement — See below.



Delete Mapped ODBC Field — See below. This button is enabled only when you click on a SendSuite field that has a host value mapped to it.

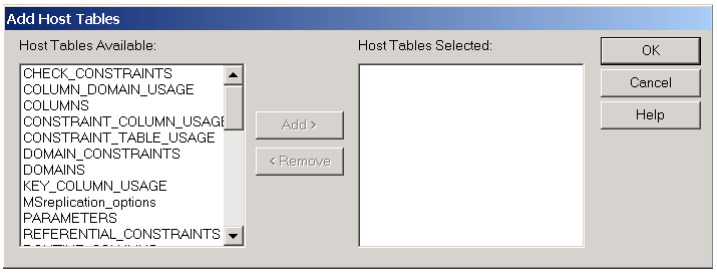


Optimization — This button is enabled only when you click on a SendSuite table or view.

NOTE: Optimization is not recommended. Running optimization removes fields from the view used by integration maps. If any of the fields you remove are needed by other maps, they will not be available.

Adding the Host Tables

Once the data exchange properties have been defined, you must add the host tables to the screen to map the fields. Use the button on the ODBC toolbar or select **Operations > Add Host Tables**.



NOTE: If SendSuite does not read the host tables, then the ODBC driver does not support this feature. The table names will have be added manually in this case.

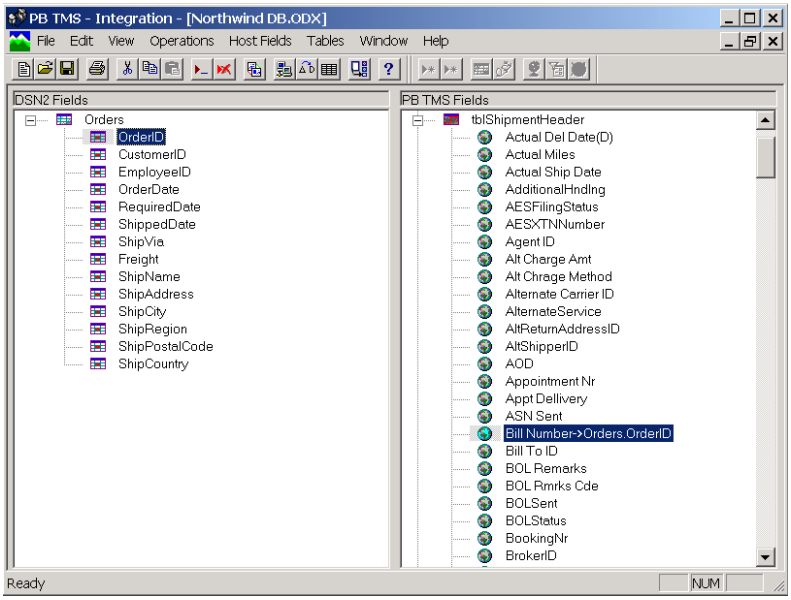
To add a host table, click on the table you want, then click the **Add** button. You may add multiple tables.

If you selected a table by mistake, click on the table in the right pane of the window and click the **Remove** button.

ODBC Integration in SendSuite Shipping

Mapping the Fields

NOTE: For all database types, if a host table name or host field name is two words (with spaces), the name must be enclosed by delimiters. Common delimiters include quotation marks (" ") and brackets ([ ]).



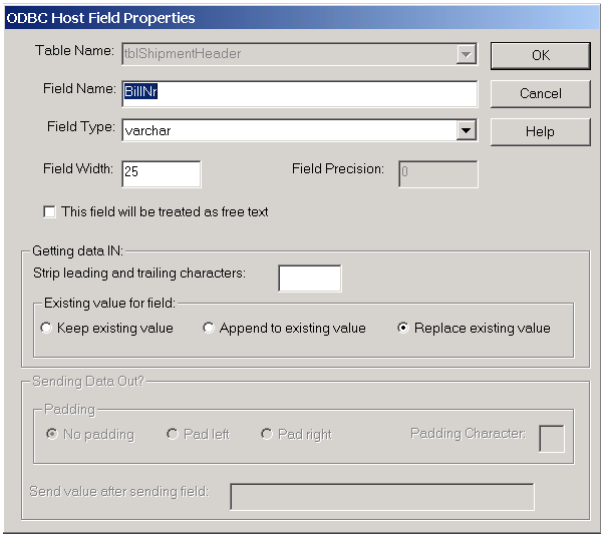
To map the fields, begin by expanding your host tables. Then expand the SendSuite table to which you will map the data.

Drag the host field and drop it onto the SendSuite field to map the data.

ODBC Integration in SendSuite Shipping

Host Field Properties

If you need to make modifications to the host field properties, right-click the host field and select **Edit**.



Field Name — This field identifies the name of the host field. Do not change this name unless you are connecting to an Access database where the field names contain spaces.

Field Type — In most cases, SendSuite automatically reads the type of data expected from the host database. Sometimes, however, you must manually set this field. All fields require a data type.

Field Width — This field defines how many characters or bytes are allowed in the field.

Field Precision — This field is enabled only when you are working with number or currency data types.

This field will be treated as free text — If selected, text in the Field Name will be used in the select statement. The syntax should be valid for the host database.

Getting data IN — Use these fields to define how data is brought into SendSuite. These fields will only be enabled when the Data Exchange Properties are set to In (SQL Select).

- **Strip leading and training characters** — If the data in the host table contains a special character before or after the data, then type that character in this field. For example, data in a field may begin and end with a space ( ).
- **Existing value for field** — If the SendSuite table already contains a value for this field, then you can tell the system what to do with that information.
  - **Keep existing value** — The new value will be ignored.
  - **Append to existing value** — The new information will be added to the field. For example, if the field contains 123 and a new value of 456 is being appended, then the field will contain 123456.
  - **Replace existing value** — The old value will be destroyed.

ODBC Integration in SendSuite Shipping

Host Field Properties

Sending Data Out? — Use these fields to define how data is to the host database. These fields will only be enabled when the Data Exchange Properties are set to Out.

- **Padding** — If you need to add extra characters to a field. For example, if the host database is expecting a 10 character string but you are only sending 7 characters, you can pad the string. SendSuite will add the necessary padding to make up the difference.
  - **Pad left** — Adds characters to the left of your string; e.g., 0000123.
  - **Pad right** — Adds characters to the right of your string; e.g., 123000.
  - **Padding character** — Indicate which character you will use for padding.
- **Send value after sending field** — Use this field for legacy systems that require a value to be sent after the data element.

ODBC Integration in SendSuite Shipping

SendSuite Shipping Field Properties

To define the SendSuite Shipping field properties, left-click on the SendSuite Shipping field, then right-click on the field name. Select **Field Properties** from the popup menu.

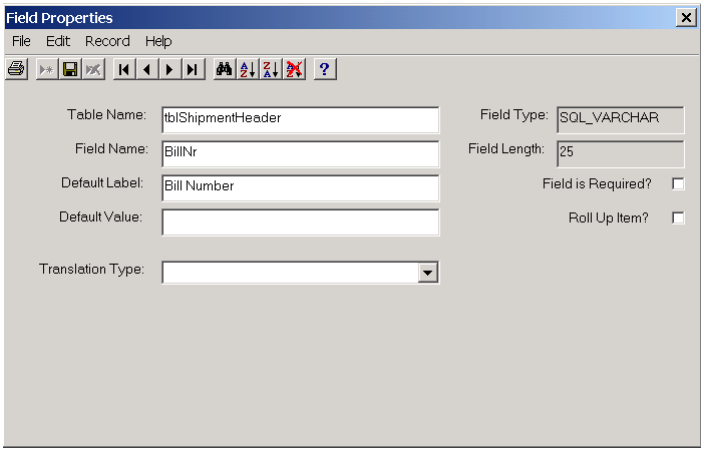


Table Name — This identifies the SendSuite table that this is on.

Field Name — This identified the field name on the SendSuite table.

Default Label — This is the name of the field as it shows in the mapping tree.

Default Value — If the value being transferred is NULL, the SendSuite will use the default value. The data input must match the Field Type. To use the current date, type TODAY (this must be in caps).

Translation Type — If the host and SendSuite use different values, then you can set up a translation. Once the translation has been defined, then you can select that translation from the drop-down here.

Field Type — This identifies the type of data expected by SendSuite.

Field Length — This identifies the maximum number of characters that the SendSuite database will accept for this field.

Field is Required? — If checked, SendSuite will require a value for this field. If a null value is sent to SendSuite, the system will return an error.

Roll Up Item? — This field applies when multiple line items are being sent to SendSuite. If checked, SendSuite will summarize all the line items into a single line.

ODBC Integration in SendSuite Shipping

Selection Criteria

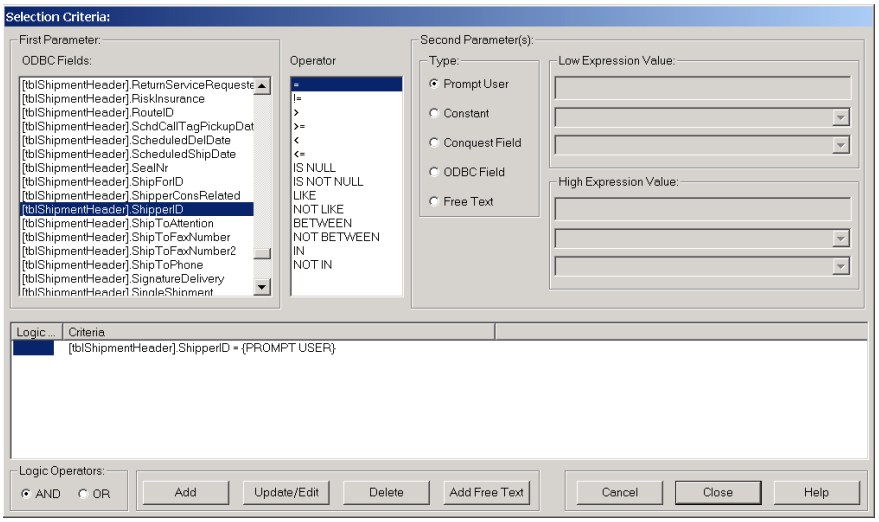
To write the SQL WHERE clause, use the SendSuite Selection Criteria tool:

1. On the SendSuite Integration window, highlight a Host table
2. On the SendSuite Integration window, highlight a SendSuite (Conquest) table
3. Open the Selection Criteria window:

- From the **Operations** menu, select **Edit Selection Criteria**.

  - OR -

- Click on the **Edit Selection Criteria** button on the ODBC Toolbar. 



4. Write a WHERE clause using Free Text.
   - You can use the SendSuite supplied tools to write a script (see “Using SendSuite supplied scripting tools” in the next section in this chapter), or you can write your own script (see *Manually Writing a SQL Statement* elsewhere in this chapter).
5. Click the **Add** button.
6. If you are going to write a multiple line statement, then follow these steps:
   a. Click **And** or **Or**. This tells the system whether a record must meet all the criteria (**And**), or just one of the criteria (**Or**). For example, if you want to select a record where the warehouse number is *5*, and the order number is *123*, then use **And**.
   b. Click the **Add** button to add the new line.
   c. Repeat Step 5 and Step 6 until you have completed the WHERE clause.
7. Click the **Close** button. Any changes are automatically saved when you close the window.

ODBC Integration in SendSuite Shipping

Selection Criteria

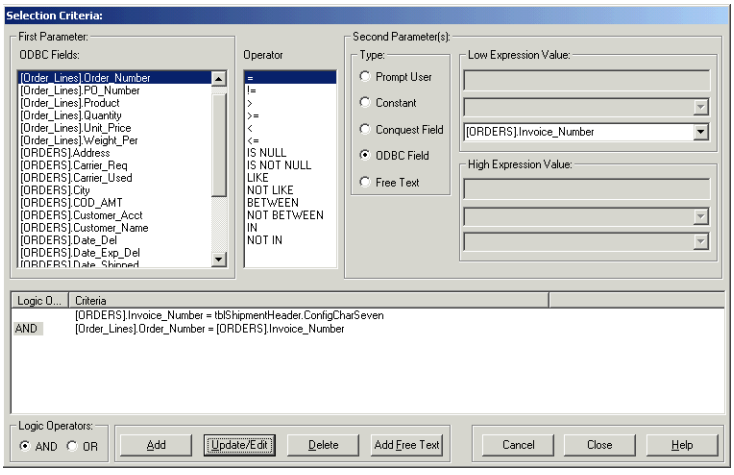
Using Sendsuite Shipping Supplied Scripting Tools

To use the SendSuite supplied scripting tools, use the fields on the screen:

1. In the **First Parameter** box, click on the first host field you want use for your selection.
2. Select the operator you want to use to compare the host data with what follows. For example, if you want to select a record where the order number is *1234*, then select the = operator.
3. In the **Second Parameter** box, tell the system what value you are looking for.

   In the **Type** box, tell the system where you will be getting the data:

   - **Prompt User** — This feature will prompt the user, but it cannot place a prompt on browser client. This option can be helpful when testing a script in the Integration module, but it cannot be used in production.
   - **Constant** — When you choose this type, you must type a value in the Low Expression Value box. When you do this, the system will always select the same record. This option can be helpful when testing a script in the Integration module.
   - **Conquest Field** — Use this feature to compare the host field to a SendSuite. For example, if the user types an order number in the ***tblShipmentHeader.ConfigCharSeven*** field on the shipping screen, the you would select this type. This is a standard method of selecting records to import into SendSuite.
   - **ODBC Field** — Use this feature to compare one host field to another. The main use of this type is when you are selecting records from multiple tables and you need to create a relationship between the tables. For example, if you want to select ***OrderHeader.OrderNumber***, and you need line items from ***OrderLine.OrderNumber***, then you will use this type. Your selection criteria might look like the following:



   - **Free Text** — Using this type, you are creating a manual script (see *Manually Writing a SQL Statement* elsewhere in this chapter).

ODBC Integration in SendSuite Shipping

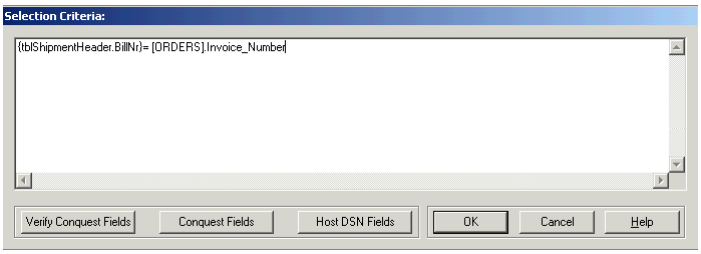
Selection Criteria

Manually Writing an SQL WHERE Clause Using Free Text

There may be many reasons to use free text instead of the SendSuite tools. For example, if you want to select only the first few characters of a field you can place a left string command in this text box.

To manually write an SQL WHERE Clause using free text:

1. Click the **Add Free Text** button.



2. You can type the statement manually, or you can use the buttons to select the fields. If you type the statement manually, make sure you use the SendSuite naming conventions (see the example above).
3. Click **OK** when you have finished the statement.

Updating a WHERE Clause

Use the WHERE free text field when a field you want to use in the selection criteria is not in the select statement.

To update a WHERE statement:

1. Open the ODBC script.
2. From the **Operations** menu, select **Edit Selection Criteria**.
3. Click in the statement you need to modify.
4. Modify the statement.
   - If you used the SendSuite tools to create the statement, then change the selections on the top of the window, then click the **Update/Edit** button.
   - If you created the statement manually, then click the **Update/Edit** button. Change your criteria in the window, then click **OK**.
5. Click the **Close** button.

XML In Integration

XML refers to eXtensible Markup Language. SendSuite can be setup to integrate with a host application using XML files.

There are many differences between XML and Data Mapping, but one of the key differences is that XML integration is executed from the shipping client, whereas the Data Mapper is executed from the Administrative Workstation.

SendSuite can import data structured in an XML format. It can also export data in an XML format, whether that is into an existing XML document, or SendSuite can create an XML file with all the data and tags.

There are many ways SendSuite can integrate using XML. Here are a few examples:

- **Batch Integration** — The host application rewrites an XML file, SendSuite imports those records in a single upload, processes the records, then exports the data back to the XML file. The host application reads the new information into its database, then rewrites the XML document with new shipments.
- **Semi-batch Integration** — As above, SendSuite imports the data in a single batch. When each shipment is processed, the data is sent back to the XML file, so the records are updated in “real time”, one record at a time.
- **Separate Batch Integration** — As above, SendSuite imports data in batch, but each client integrates with a different XML file.
- **Single file integration** — The operator provides SendSuite with a shipment number. SendSuite looks for an XML file with that number in the title. SendSuite imports data from that file, processes it, and sends the data back to the same file.

Preparation

It is important to review the XML file structure and data before creating the XML map in the SendSuite. You must know which tags will contain the data coming into or going out of SendSuite.

Some XML files may contain multiple records. Only one record is necessary when setting up the mapping in SendSuite, so try to obtain a copy of the XML file with only one record (or you can edit the file to include only one record).

It is important to verify that the XML file is structured properly before mapping it. One way to test an XML file structure is to get a copy of an XML file and drag it into a Web browser. If the data shows in the browser window, then the basic XML structure is good and the file can be used. If the page cannot be displayed, then the XML structure is bad and you must obtain a new XML file. Other software may be used to parse the XML file for validity, but this method will verify its basic structure.

XML In Integration

General Instructions

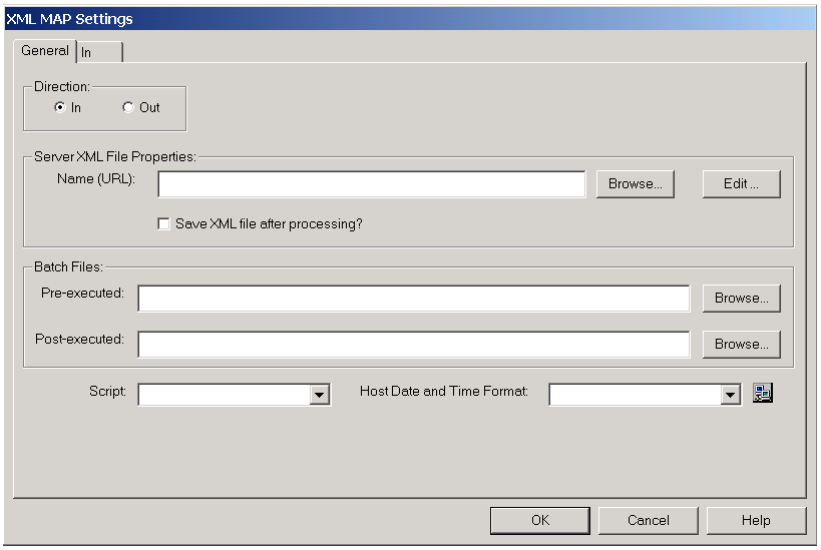
When preparing XML Integration in SendSuite, you will follow this general set of instructions. There is considerable detail when completing these steps, so refer to the pages that follow for more detail.

1. From the **Control Center**, open the **Integration** module.
2. From the **File** menu, select **New**, or click the **New** button.
3. Select **XML Data Exchange** from the list of file types, the click **OK**.
4. For the direction, select **In**.
5. Locate the XML file that contains the data coming into SendSuite.
6. If applicable, identify any batch files that will run with the map.
7. If applicable, select a conditional logic VBScript that will run with the map.
8. Select the view that will be used (this determines the SendSuite tables that can be mapped to or from).
9. Define the line item, multiple record, and locked record behaviors.
10. Set the properties of the XML parent tags.
11. Set the properties of the XML fields, identifying the key fields.
12. Map the fields.
13. Save the XML Map.
14. Execute the map from the Shipping Workstation.

XML In Integration

XML Map Settings

The XML Map Settings window appears immediately when you create a new map. To modify the settings for an existing map, select **Map** > **Change XML Map Properties**.



General Tab

Direction — Sets the way the data will flow

- **In** — Data coming into the SendSuite database
- **Out** — Data going out of SendSuite to an XML file

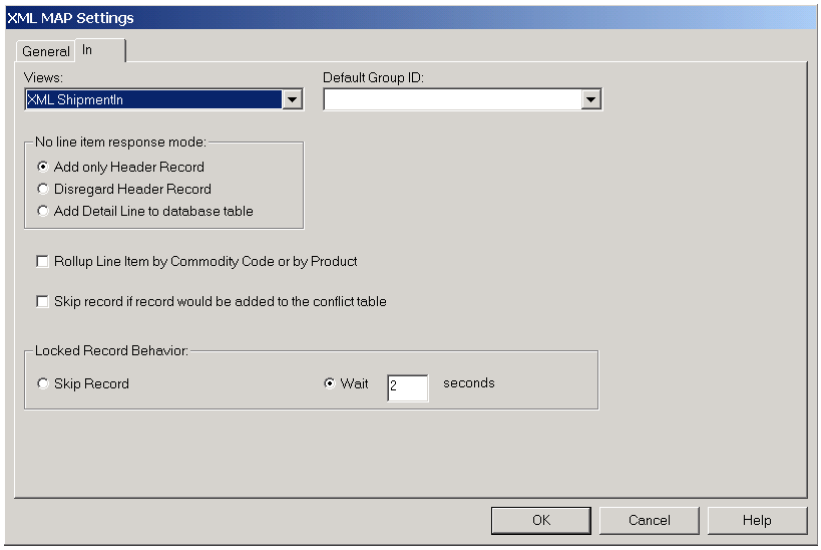
Server XML File Properties

- **Name (URL)** — (required) Type the source file (you may also browse for the file—see below).
  - **Browse** — Click this button to search for the file you want to use.
  - **Edit** — Click this button to open the file you selected using Notepad.
- **Save XML after processing?** — This feature saves the XML file and does not delete it.
- **Batch Files** — Type (or browse) to select an exe, com or bat file to process before or after the mapping. For example, to run a process on the host that creates the XML data.
- **Conditional Logic Script** — From the drop-down, you can select a VBScript to run at the time the map is running. The script conditional logic will run for each record as it is processed.
- **Host Date and Time Format** — From the drop-down, you can select a date and time translation.

XML In Integration

XML Map Settings

In Tab



Views — From the drop-down, select the type of data you will bring into SendSuite. The selection you make determines the database tables and fields you can map to. Once you make a selection and close the setting window, you cannot change your selection.

- **XML ShipmentIn** — This will allow you to map data to the following tables or views:

tblShipmentHeader	vBillTo (tblAddress)	vShipper (tblAddress)
tblShipmentLine	vConsignee (tblAddress)	

- **XML ShipmentIn** is the only view available for XML In maps.

Default Group ID — Only enabled when **XML ShipmentIn** is selected, you can type or select a Group ID to which all shipments will be assigned.

XML In Integration

XML Map Settings

No line item response mode — If SendSuite is expecting a line item for each header, your selection here will determine what the system should do if there is no line item.

- **Add only Header Record** — This will add only the header record, leaving a line blank.
- **Disregard Header Record** — This will skip that record and go on to the next.
- **Add Detail Line to database table** — This will add the header record and create a dummy line record as well.

Rollup Line Item by Commodity Code or by Product — By default, SendSuite will add each ***tblShipmentLine*** as a separate record. If you select this box, SendSuite will consolidate multiple lines where the commodity or product code is the same.

For example, SendSuite will create one line with 7 pieces from a host file with the following lines:

Pieces	Commodity
5	123456
2	123456

Skip record if record would be added to the conflict table — SendSuite will not overwrite or update existing records in the database. Instead, duplicate records are added to ***tblShipmentHeaderConflict***.

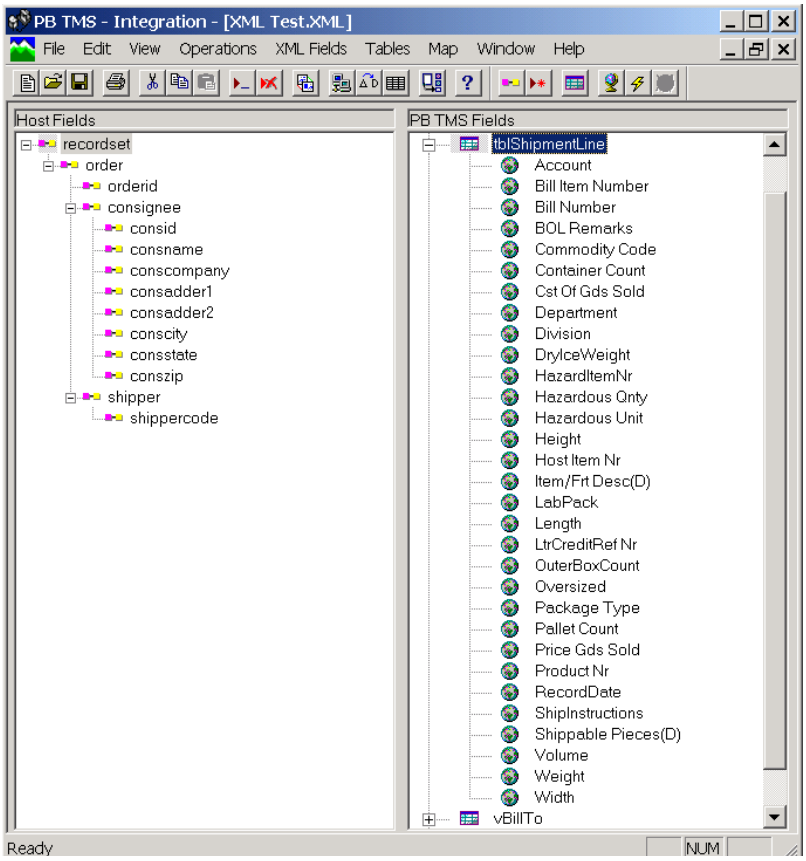
If you select this box, SendSuite will skip the duplicate record and it will not add it to the database.

Locked Record Behavior — Records are locked when they are in use by another application or user. If SendSuite encounters a locked record, your selection here determines what the system will do:

- **Skip Record** — The record is skipped and not added to the database
- **Wait** — The system will retry after waiting the number of seconds you specify. If the record is still locked, the system will wait again until the record is unlocked.

XML In Integration

Mapping the Fields



Adding Host Fields

New Map

When creating a map for the first time, the first thing you must do is define the fields on the XML file.

- You can do this manually by selecting **XML Fields > Add a XML** field.
- If your XML file already exists, select **XML Fields > Create XML Tree View**. This will import the tags from the XML file and display them in the left pane of your window.

  Note that if your XML file contains multiple records, SendSuite will import each parent tag and display it in the tree. You need only one parent tag record, so delete any extras by clicking on the tag and pressing the **D** key.

  Since the parent tag will be used for each data record in your XML file, you must change its properties.

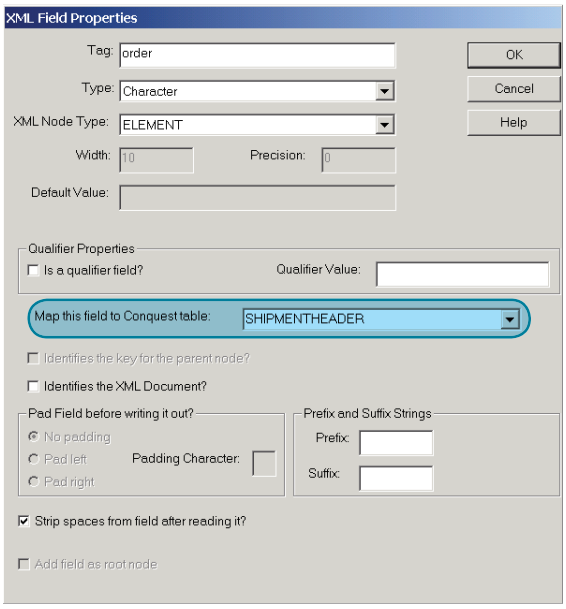
To change the parent tag's properties:

1. Left-click on the tag.
2. Right-click on the tag.

XML In Integration

Mapping the Fields

3. Select **Edit**.



4. Click the drop-down arrow next to **Map this field to Conquest table** and select the table primary table you are mapping to or from; e.g., ShipmentHeader, Load, etc. (See *Host Field Properties — XML In* elsewhere in this chapter.)

Existing Map

If you are adding host fields to an existing map, select **XML Fields** > **Add a XML field**. If you select **Create XML Tree View**, you will destroy your old tree and you must remap all the fields again.

XML In Integration

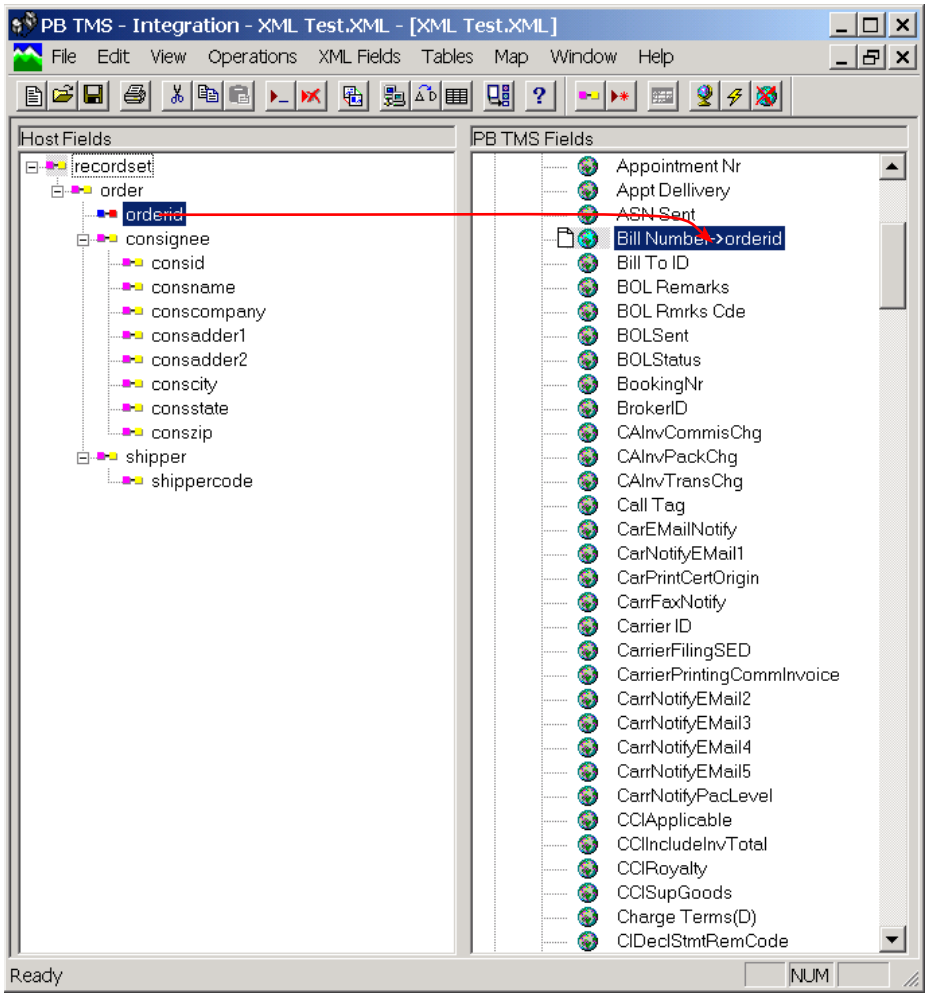
Mapping the Fields

Mapping Fields

To map the fields, begin by expanding your host records. Then expand the SendSuite table to which you will map the data.

To map a field, click and drag the host field onto the SendSuite (Conquest) field. If you mapped the field successfully, the host field icon and the SendSuite field icon change color. Also, in the SendSuite pane, the host field name appears next to the SendSuite field name.

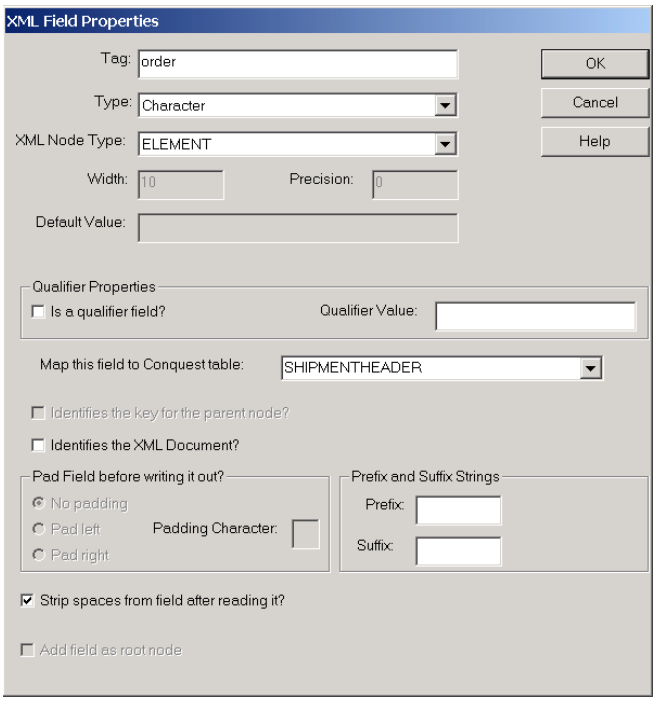
NOTE: Do not let up on the mouse button until you have reached a SendSuite field. Releasing the button too quickly will result in the host field being deleted.



XML In Integration

Host Field Properties — XML In

To define the host field properties, left-click on the host tag, then right-click on the tag. Select **Edit** from the popup menu.



Tag — This field contains the XML tag name.

Type — This field identifies the data type in this field; for example, character, number, date or time.

XML Node Type — This identifies what will be found in the XML tag. The default value is **ELEMENT** and that should be used for all fields being mapped into SendSuite. For example, you can identify the source tag as an Entity Reference; however, since data from these tags would not be directly imported, it is not necessary to map them or define their properties.

Qualifier Properties — If the source file uses repeating segments, this identifies the field as a qualifier and defines its value.

Map this field to Conquest table — This applies to the parent node only. In order to successfully map data into or out of SendSuite, you ***must*** choose a SendSuite table from this drop-down list. If the tag you have selected is a child, then this field is disabled.

Identifies the XML Document? — Use this to flag the root node.

Prefix and suffix strings — Identify any characters that precede or follow the actual data you are transferred; for example, remove quotation marks.

Strip spaces from field after reading it? — This is checked by default and it will remove any blank leading and trailing spaces from a field. This can be useful if the host system always outputs the maximum number of character for a field, padding the data with spaces.

XML In Integration

SendSuite Shipping Field Properties

To define the SendSuite Shipping field properties, left-click on the SendSuite field, then right-click on the field name. Select **Field Properties** from the popup menu.

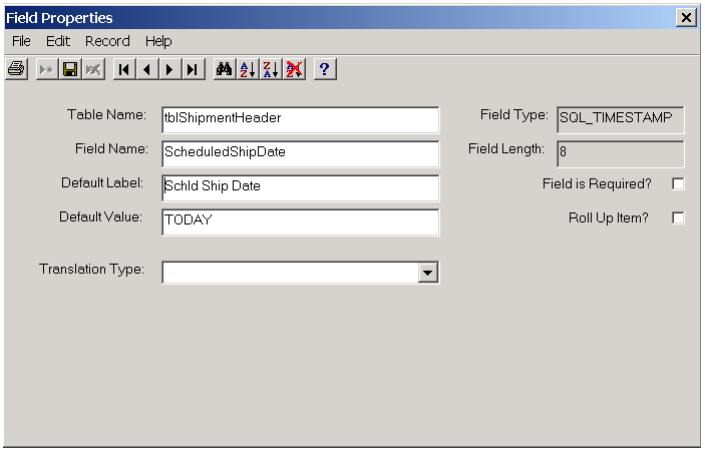


Table Name — This identifies the SendSuite table that this is on.

Field Name — This identified the field name on the SendSuite table.

Default Label — This is the name of the field as it shows in the mapping tree.

Default Value — If the value being transferred is NULL, the SendSuite will use the default value. The data input must match the **Field Type**. To use the current date, type **TODAY** (this must be in caps).

Translation Type — If the host and SendSuite use different values, then you can set up a translation. Once the translation has been defined, then you can select that translation from the drop-down here.

Field Type — This identifies the type of data expected by SendSuite.

Field Length — This identifies the maximum number of characters that the SendSuite database will accept for this field.

Field is Required? — If checked, SendSuite will require a value for this field. If no value is sent to SendSuite, the system will return an error.

Roll Up Item? — This field applies when multiple line items are being sent to SendSuite. If checked, SendSuite will summarize all the line items into a single line.

Running XML

Refer to the XML In instructions in *SVTS9131 XML Configuration Guide*.

XML Out Integration

General Instructions

When preparing XML Out Integration in SendSuite, you will follow this general set of instructions. There is considerable detail when completing these steps, so refer to the pages that follow for more detail.

The following steps are required, unless noted otherwise:

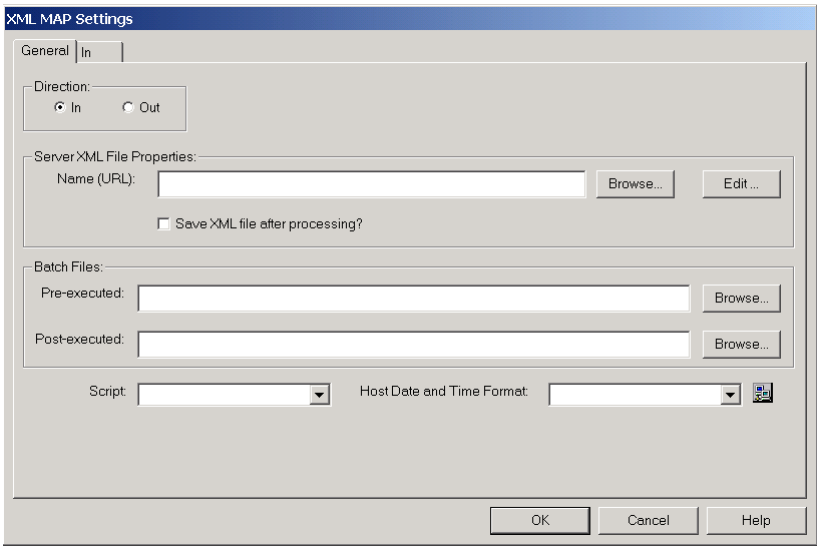
1. From the **Control Center**, open the **Integration** module.
2. From the **File** menu, select **New**, or click the **New** button.
3. Select **XML Data Exchange** from the list of file types, then click **OK**.
4. Set up the map properties (see *XML Map Settings* elsewhere in this chapter for more information).
   a. For the direction, select **Out**.
   b. Identify the **XML file** that the data will be going to.
   c. If applicable, identify any **Batch Files** that will run with the map.
   d. If applicable, identify a conditional logic **VB Script** that will run with the map.
   e. Select the **view** that will be used (this determines the SendSuite tables that can be mapped to or from).
   f. Identify the **Selection Criteria** that will be used to select the data going out.
5. Map the fields (see *Mapping the Fields* elsewhere in this chapter for more information).
6. Modify the **Host Field Properties** (see *Host Field Properties—XML Out* elsewhere in this chapter for more information).
   a. For each parent node, select the SendSuite table that will be used to retrieve data.
   b. Identify the primary key in each parent node.
7. Save the XML Map.
8. If applicable, set up the shipping screen to execute this integration using the XML Out This Shipment subevent. See *Processing Events* in Chapter 3.

NOTE: Make sure that you choose the same SendSuite table for the host field properties on the parent node matches the table used selected for the view.

XML Out Integration

XML Map Settings

The XML Map Settings window appears immediately when you create a new map. To modify the settings for an existing map, select **Map > Change XML Map Properties**.



NOTE: When using XML File Link, select an XML document that will serve as a template for all other XML documents.

General Tab

Direction — Sets the way the data will flow

- **In** — Data coming into the SendSuite database
- **Out** — Data going out of SendSuite to an XML file

Server XML File Properties

- **Name (URL)** — (required) Type the name of the file SendSuite will be sending data to (you may also browse for the file—see below).
  - **Browse** — Click this button to search for the file you want to use.
  - **Edit** — Click this button to open the file you selected using Notepad.
- **Save XML after processing?** — This feature is used to track the history of data imported by keeping a record of all the files imported.

  After SendSuite processes the file, it will copy the data into a new file, and append the file extension with a numeric value. For example, if the original file name was Hostdata.xml, SendSuite will create a new file called Hostdata.xml00. SendSuite will create a maximum of 11 (00-10) files, then it starts over (00).

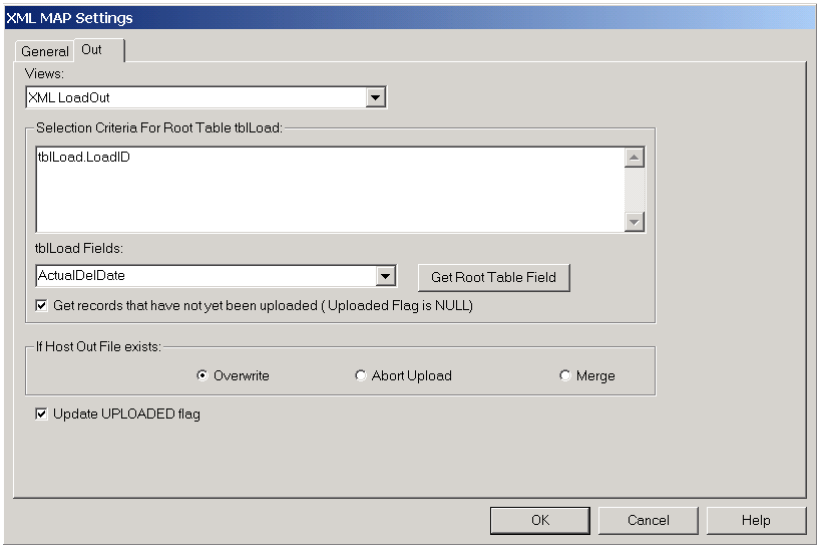
  Each time the host file is processed, SendSuite will create a new file with the next number in sequence. For example, if the original file was processed five times, you will see the following files: Hostdata.xml, Hostdata.xml00, Hostdata.xml01, Hostdata.xml02, Hostdata.xml03, and Hostdata.xml04.
- **Batch Files** — Type (or browse) to select an .exe, com or bat file to process before or after the mapping.

XML Out Integration

XML Map Settings

- **Conditional Logic Script** — From the drop-down, you can select a VBScript to run at the time the map is running. The script conditional logic will run for each record as it is processed.
- **Host Date and Time Format** — From the drop-down, you can select a date and time translation.

Out Tab



Views — From the drop-down, select the type of data you will export from SendSuite. The selection you make determines the database tables and fields you can map to. Once you make a selection and close the setting window, you cannot change your selection.

- **XML ShipmentOut and XML LoadOut** — This will allow you to map data to the following tables or views:

tblCost	tblShipmentHeader	vBillTo (tblAddress)
tblLoad	tblShipmentLine	vConsignee (tblAddress)
tblMultipackTotals	tblStop	vShipper (tblAddress)

Selection Criteria For Root Table — Type or select the fields you will use to select data from the SendSuite database. To select fields, click the drop-down under tbl~ Fields, select the field, then click **Get Root Table Field**.

Get records that have not yet been uploaded (Uploaded Flag is NULL) — Select this box when you want to write out only records that have not been uploaded before. SendSuite will look at

tblShipmentHeader.Uploaded for a date or a NULL.

XML Out Integration

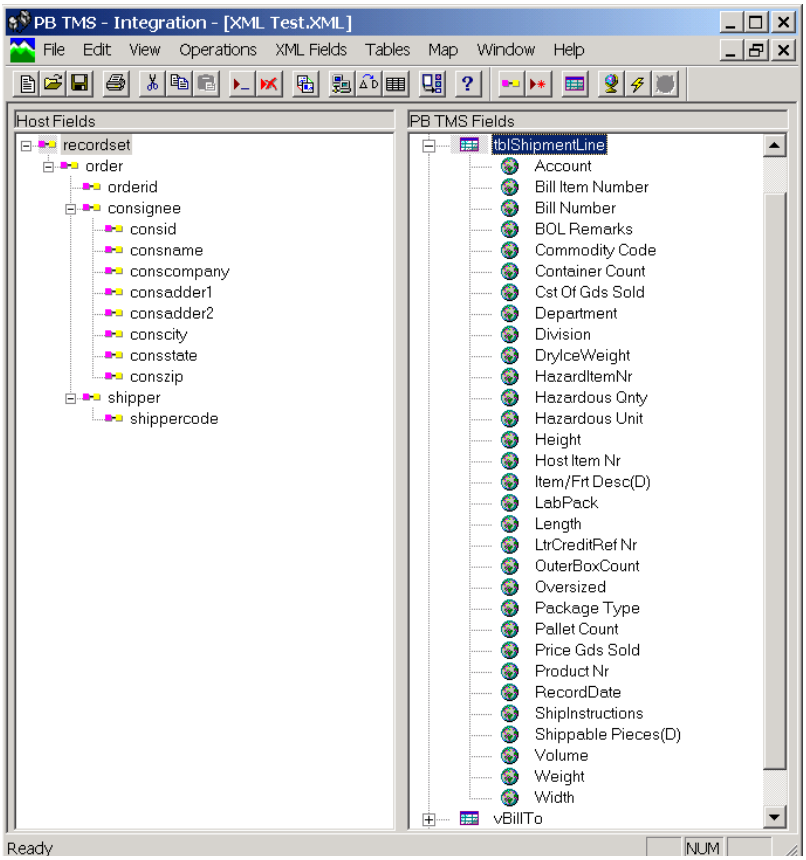
XML Map Settings

If Host File exists — If the file name you are writing to already exists, your must tell SendSuite what to do with the new data.

- **Overwrite** — This will rewrite the file with only the new data. The previous data in the file will be lost.
- **Abort Upload** — This will stop the transfer of data out of SendSuite.
- **Merge** — This will add the new data to the existing data in the file.

Update UPLOADED flag — By selecting this box, SendSuite will add the current date to ***tblShipmentHeader.Uploaded***.

Mapping the Fields



Adding Host Fields

New Map

When creating a map for the first time, the first thing you must do is define the fields on the XML file.

- You can do this manually by selecting **XML Fields** > **Add a XML field**.
- If your XML file already exists, select **XML Fields** > **Create XML Tree View**. This will import the tags from the XML file and display them in the left pane of your window.

XML Out Integration

Mapping the Fields

Note that if your XML file contains multiple records, SendSuite will import each parent tag and display it in the tree. You need only one parent tag record, so delete any extras by clicking on the tag and pressing the **Delete** key.

Since the parent tag will be used for each data record in your XML file, you must change its properties.

To change the parent tag's properties:

1. Left-click on the tag.
2. Right-click on the tag.
3. Select **Edit**.
4. Click the drop-down arrow next to Map this field to Conquest table and select the table primary table you are mapping to or from; for example, ShipmentHeader, Load, etc. (See *Host Field Properties—XML Out* elsewhere in this chapter.)

Existing Map

If you are adding host fields to an existing map, select **XML Fields** > **Add a XML** field. If you select **Create XML Tree View**, you will destroy your old tree and you must remap all the fields again.

XML Out Integration

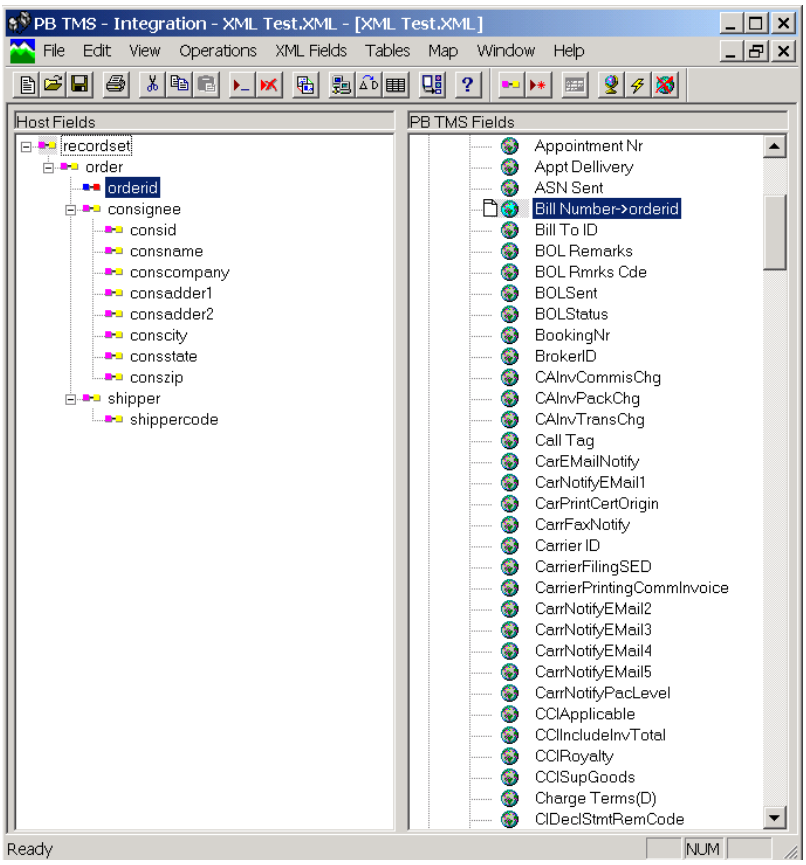
Mapping the Fields

NOTE: Do not let up on the mouse button until you have reached a SendSuite field. Releasing the button too quickly will result in the host field being deleted from the list. Right-click and select **Add XML Field** to add the field back in.

Mapping Fields

To map the fields, begin by expanding your host records. Then expand the SendSuite table to which you will map the data.

To map a field, click and drag the host field onto the SendSuite (Conquest) field. If you mapped the field successfully, the host field icon and the SendSuite field icon change color. Also, in the SendSuite pane, the host field name appears next to the SendSuite field name.



To define the host field properties, left-click on the host tag, then right-click on the tag. Select **Edit** from the popup menu. Many of the definitions are them same as the Host Field Properties—XML In elsewhere in this chapter. The differences are noted below:

Qualifier Properties — This will always be disabled for data going out of SendSuite.

Identifies the key for the parent node? — You must identify the primary key for each parent node. This maintains system integrity when sending data out of SendSuite. If you do not make a selection, then SendSuite will not send data out correctly.

Pad field before writing it out? — Using these radio-dial buttons, you can add characters to the left or the right of the data you are sending back to the host. For example, if SendSuite is sending back “Dave” but the host system expects 10 characters, you can pad right so SendSuite actually sends back “Dave ”.

XML Out Integration

SendSuite Shipping Field Properties

To define the SendSuite Shipping field properties, left-click on the SendSuite Shipping field, then right-click on the field name. Select **Field Properties** from the popup menu.

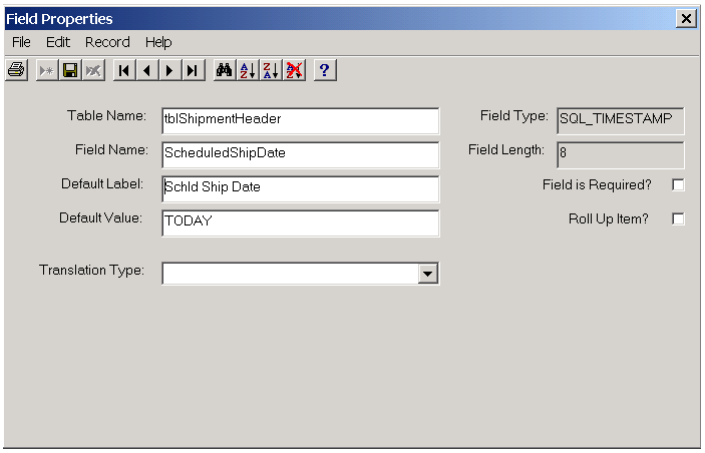


Table Name — This identifies the SendSuite table that this is on.

Field Name — This identified the field name on the SendSuite table.

Default Label — This is the name of the field as it shows in the mapping tree.

Default Value — If the value being transferred is NULL, the SendSuite will use the default value. The data input must match the **Field Type**. To use the current date, type **TODAY** (this must be in caps).

Translation Type — If the host and SendSuite use different values, then you can set up a translation. Once the translation has been defined, then you can select that translation from the drop-down here.

Field Type — This identifies the type of data expected by SendSuite.

Field Length — This identifies the maximum number of characters that the SendSuite database will accept for this field.

Field is Required? — If checked, SendSuite will require a value for this field. If no value is sent to SendSuite, the system will return an error.

Roll Up Item? — This field applies when multiple line items are being sent to SendSuite. If checked, SendSuite will summarize all the line items into a single line.

Running XML

- If you are running the XML Out on a shipment by shipment basis, refer to Processing Events in Chapter 3 for information on how to create a shipping subevent to perform the XML Out process.

XML Integration: File Link

XML File Link integration allows you to use the shipping screen to perform the XML In and XML Out data transfers. Instead of always looking at the same XML file, XML file link uses a key field from the shipping screen to identify the XML file to read. For example, if the user wants to process order 4567, the user types that number on the shipping screen, performs the *XML File Link In* event, and SendSuite looks for a file called *4567.XML*.

From an operator's viewpoint, XML File Link behaves very much like ODBC integration. The operator scans a bar code, and a single shipment comes in. In order to use this method of integration, the host system must write a unique XML file for every shipment that will be processed.

To set up the XML File Link In integration map, follow the same general instructions for setting up a batch map. See *General Instructions* elsewhere in this chapter.

File Link Setup

After setting up the map properties, you must configure the map for XML File Link following these instructions:

1. Click on the **Map** menu and select **File Link Setup**.
2. In the **Directory Name** field, type or browse for the *directory* where the XML documents will be stored. The directory must be accessible from the server (on either a local or mapped drive).
3. In the **File Extension** field, type the extension used on the files in this directory.
4. In the **File Name From** box, locate and click on the SendSuite field that will be used to select the XML file. For example, if the user types the bill number into the ***ConfigCharEight*** field on the shipping screen, then open ***tblShipmentHeader*** and select ***ConfigCharEight***.
5. Click **OK** to save this setup.
6. Set up the shipping screen. See *Modifying the Shipping Screen for XML File Link* elsewhere in this chapter.

NOTE: These files must be in XML format (using XML tags), but they do not have to have the .xml file extension; they can be simple text files with a .txt extension.

To set up the XML File Link In integration map, follow the same general instructions for setting up a batch map. See *General Instructions* elsewhere in this chapter. You must make sure that the **Host File Properties** are set correctly, and that they are in line with **View** used for the map.

After setting up the map properties, you must configure the map for XML File Link following the instructions for File Link In Setup above.

Set up the shipping screen (see next page).

XML Integration: File Link

Modifying the Shipping Screen for XML File Link

Once the integration files have been set up, you must set up the Shipping screen.

To set up the Shipping screen:

1. Make sure that the field you selected in Step 4 above is on the screen. If it is not, see *Configure the Appearance of the Shipping Screen* in Chapter 3 for instructions for adding a field to the screen.
2. Add the **XML File Link In** and **XML File Link Out** sub-events to processing event. See *Processing Events* in Chapter 3 for instruction on how to add and modify shipping sub-events.

Running XML

Once the shipping screen has been set up, the XML integration is executed using the sub-events on the screen.

Conditional Logic Scripting

NOTE: Scripts are can be edited, run, and parsed on the SendSuite server. However, on an admin station that is *not* the server, the field tree will not be displayed and the Parse Script feature will not function.

SendSuite is designed to perform specific tasks. When circumstances dictate, you can write conditional logic scripts to perform actions that are not part of the system design.

There are two versions of Conditional Logic:

- SendSuite toolset
- Microsoft Visual Basic® Scripting (VBScript) interface in SendSuite

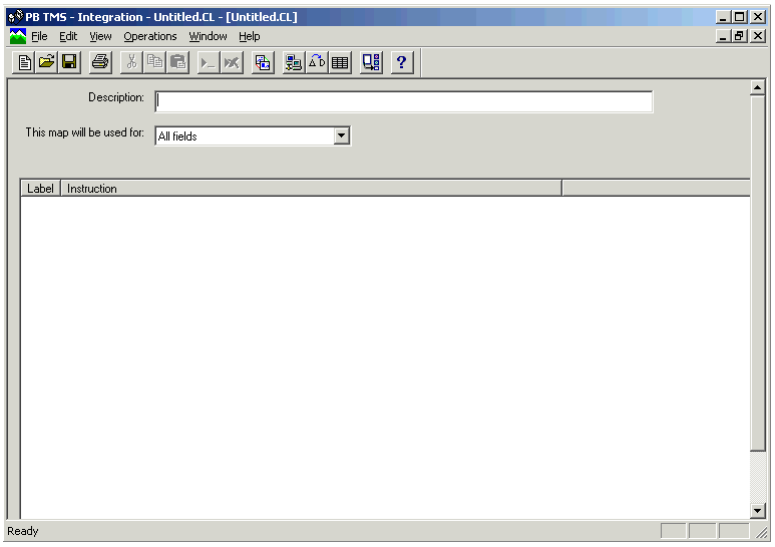
The type of script you use depends on where in the application you want to use:

- Shipment Processing uses VBScript
- Data Mapper integration uses the SendSuite toolset.
- XML integration uses VBScript

Conditional Logic Scripting

SendSuite Shipping Toolset

1. From the **Control Center**, select the **Integration** module.
2. Click the **New** button.
3. Select **Conditional Logic**.

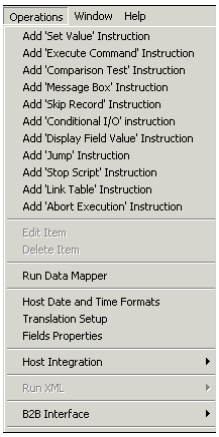


4. Briefly explain what the script is for in the **Description** field.
5. In the **This map will be used for** field, choose the function that you will use the script for. When you make a selection, you will be able to use the script only for that function. For example, if you Data Mapper Shipment In, you will not be able to use the script with Shipment Processing screen.
6. Begin writing the script by selecting an item from the **Operations** menu (see below).
7. Click the **Save** button and give the script a name. This is the name you will see when you select the script from a drop-down.

NOTE: Using the **This map will be used for** field for Shipment Processing is obsolete.

Conditional Logic Scripting

Conditional Logic Operations



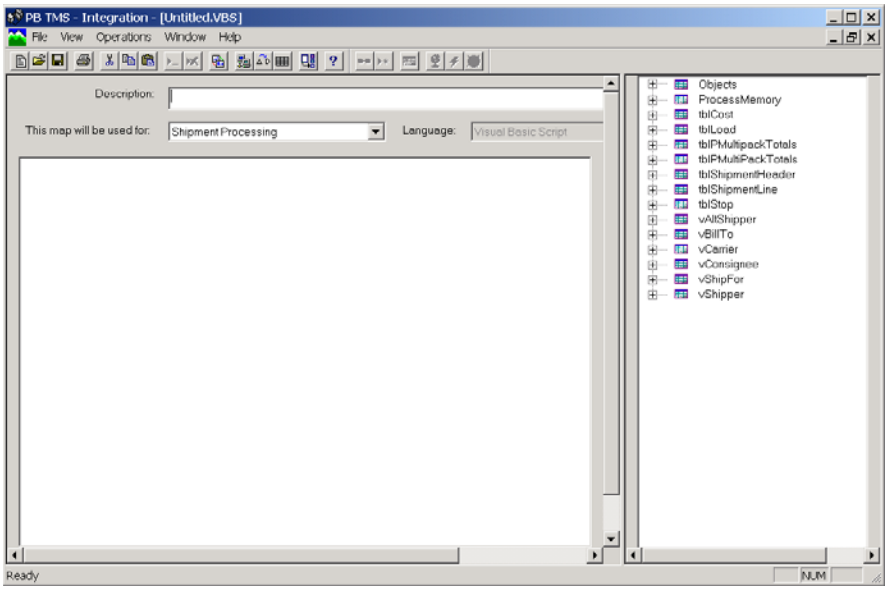
Operation	What it does	
Set Value	Assigns a value to a field	
Execute Command	Runs an external .exe, .com. or .bat	
Comparison Test	Creates an IF statement.	If the result of the comparison is TRUE, then the script proceeds to the next line. If it is FALSE, then it skips one line. If you need to run a series of commands for a TRUE statement, then your next line will be JUMP pointing to a sub-script
Message Box	Creates a message box during run time	
Skip Record	Omits the current record	Can be used after a comparison test to skip invalid records
Conditional I/O	Obsolete	
Display Field Value	Shows the value of a field during run time	
Jump	Will go to another line in the script	
Stop Script	Ends the script at this line	Can be used in the middle of script to stop the script before it hits a sub-script
Link Table		
Abort Execution	Stops the data mapper	

Conditional Logic Scripting

To write a new script, open the Integration module from the **SendSuite Control Center** on the administrative workstation.

Click the **New** button, and select **Script**.

VBScript Conditional Logic Properties



Description — Type a description of the script you are writing.

This map will be used for — Click the drop-down and select the use for this script. Your selection determines what SendSuite tables you can view. It also will determine where the script can be used. For example, if you choose XML ShipmentIn, you will not be able to use this script in the Shipment Processing module.

Once you start typing your script, you will disable this field. Once you save the script, you will not be able to change this field.

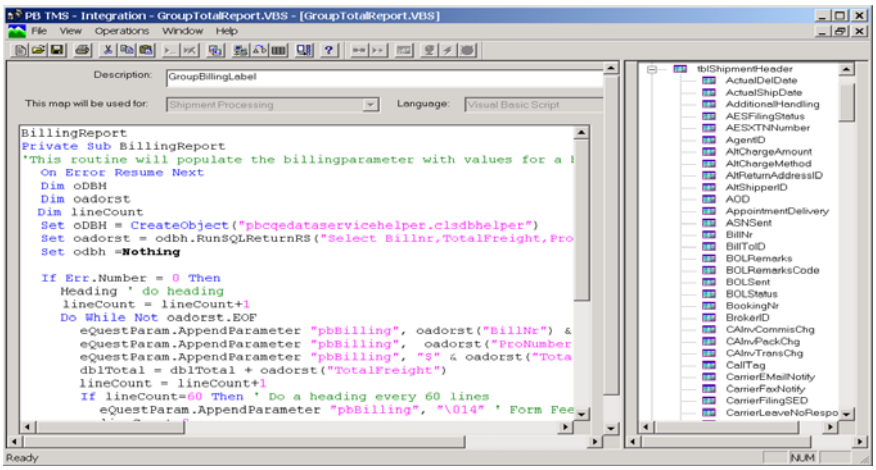
Language — The default is Visual Basic Script. The field is not enabled, so you cannot change this.

Conditional Logic Scripting

You write your script in the large text box. You can write your script freehand, you can copy a script from another application (such as Notepad).

It is important that you use the SendSuite field names *as they have been defined for scripting*. If you are unfamiliar with the SendSuite field names, you can insert them by selecting them from the tables in the right pane of your window.

Writing a Script



In the left pane, place your cursor where you want the SendSuite field to appear in your script. Double-click the field name in the right pane.

Parsing a Script

You can use SendSuite tools to validate your script.

> **NOTE:** This utility will only validate the syntax of your VBScript. It will not validate whether SendSuite will use the script correctly or that the user will be able to execute the script on their client workstation. The script should be thoroughly tested with the SendSuite function that is using it.

Select **Operations** > **Parse Script** to validate the script.

Attaching the Script to a Shipping Screen

A script that has been written for shipment processing must be added to the shipping screen. See *Processing Events* in Chapter 3.

Attaching a Script to an Integration Map

A script that has been written for an integration map must be added to the map properties. See *Data Mapper* elsewhere in this chapter.

Importing Data From Ascent

SendSuite Shipping can import existing address data from an Ascent™ system using the Data Mapper. Pitney Bowes includes Data Maps for importing Ascent data on your SendSuite Shipping DVD. Use the instructions below to import Ascent data into SendSuite Shipping.

Importing Address Data

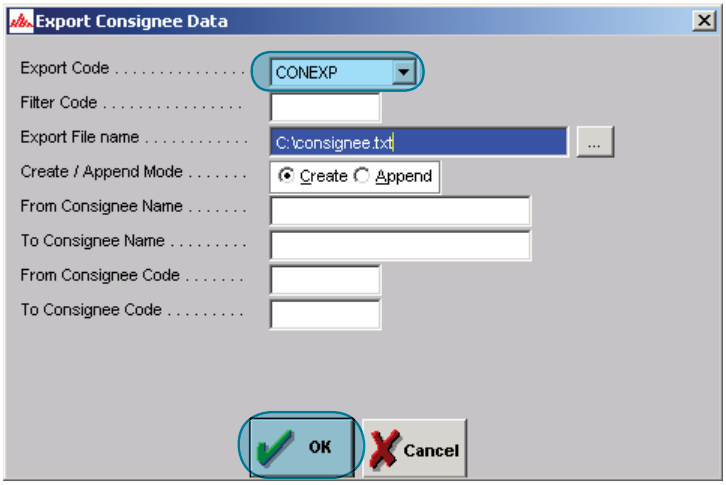
Extracting the Data From Ascent

To extract the data from Ascent:

1. On your Ascent computer, insert your SendSuite Shipping DVD into your DVD/CD-ROM drive.
2. Open Ascent Setup.
3. Click **File > Import Script…**.
4. Select **DB Export Script**.
5. Name the script **CONEXP** in the **Destination Script Code** field.
6. Click [...] and navigate to your DVD/CD-ROM drive. Select **ASCENT CONS EXPORT.EXX**. Click **OK**.



7. Click **File > Export DB Data…**.
8. Select **CONEXP** from the **Export Code** drop-down menu.
9. Ensure the **Export File name** is **C:\consignee.txt**.
10. Click **OK**.

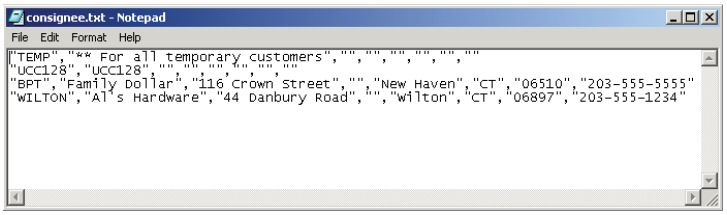


11. Click **OK** at the confirmation prompt.

Importing Data From Ascent

Importing Address Data

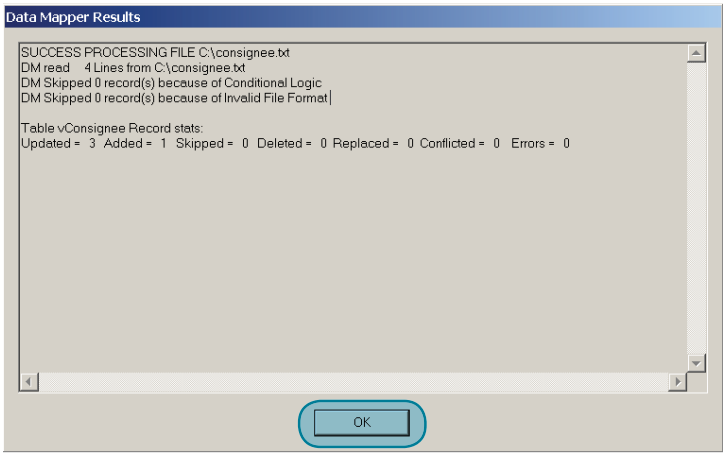
12. In Windows Explorer, navigate to C:\ and open **consignee.txt** in Notepad.
    - Verify the data was exported properly. The file should look similar to the graphic below.


consignee.txt - Notepad
File Edit Format Help
"TEMP","** For all temporary customers","","","

Importing Data From Ascent

Importing Address Data

8. After a successful import, the Data Mapper Results will display. Click **OK**.


Data Mapper Results
SUCCESS PROCESSING FILE C:\consignee.txt
DM read 4 Lines from C:\consignee.txt
DM Skipped 0 record(s) because of Conditional Logic
DM Skipped 0 record(s) because of Invalid File Format
Table vConsignee Record stats:
Updated = 3 Added = 1 Skipped = 0 Deleted = 0 Replaced = 0 Conflicted = 0 Errors = 0
OK

Verifying the Results

Open the Address Table in the Supporting Data module. All of the Ascent records you imported should now be in SendSuite Shipping's Address Table.

A Appendix A: Supported Peripherals

Supported Peripherals in SendSuite Shipping A-2
Manuals for Peripherals..... A-3

Supported Peripherals in SendSuite Shipping

SendSuite® Shipping supports the following peripherals:

Forms Printers

- J624 Laser Printer
- J630/J632 Standard Report Printer
- J670/J676 Forms Printer
- J680 High Speed Forms Printer
- J683 Laser Printer
- J685 Laser Printer with Duplex Unit

Label Printers

- J693 Datamax Printer
- J695 Datamax Printer
- 1E05 Zebra 200 DPI Printer
- 1E08 Zebra 200 DPI Printer

Scales

- ExpressCube Scale
- A217/A218/A219 Tabletop Scale
- JN50/JN55 Rollertop Scale
- JN6X (JN60, JN64) 150 lbs. Rollertop Scale
- J06X (J060, J064) 200 lbs. Rollertop Scale
- J070/J075 100 lbs. Tabletop Scale
- JN75 100 lbs. Tabletop Scale
- Toledo 2038/2138 1000 lbs. Scale
- Mettler Toledo (2158) Lynx Floor Scale

Scanners

- J765 — Non-Contact Programmable Laser Scanner
- F196022 — Contact Wedge Scanner

Postage Meters

- A900 Electronic Postage Meter
- B900 Post-Right Postage Meter
- 6500/6501
- E100/101 Paragon Meters

  NOTE: The above meters are supported via legacy PBIO, and are not available for purchase.

- DM300 - DM1000 Postage Meters

Manuals for Peripherals

The tables below list all relevant manuals for setting up and operating SendSuite-compatable peripherals (if available).

Forms Printers

J624 Laser Printer	
J630/J632 Standard Report Printer	SV60262 — Model J630 Printer Product Reference Manual SV60262-PL — Model J630 Printer Parts Reference Guide SV60257 — Model J630 Printer Operating Guide SV60538 — Model J632 Printer Operating Guide
J670/J676 Forms Printer	SV60077 — Model J670 Printer Product Reference Manual SV60077-PL — Model J670 Printer Product Parts List SV60079 — Model J670 Printer Operating Guide SV60442 — Model J676 Printer User's Manual
J680 High Speed Forms Printer	SV60111 — Model J680 Printer Product Reference Manual SV60111-PL — Model J680 Printer Product Parts List SV60110 — Model J680 Printer Operating Guide
J683 Laser Printer	SV60465 — J683 User's Guide
J685 Laser Printer with Duplex Unit	

Label Printers

J693 Datamax Label Printer	SV60824 — J693 Operator's Manual
J695 Datamax Label Printer	
1E05 Zebra 200 DPI Printer	SV61120 — Printer Instructions
1E08 Zebra 200 DPI Printer	

Manuals for Peripherals

Scales

ExpressCube Scale	SVTS9148 — Setup Instructions, pending approval
A217/A218/A219 Tabletop Scale	SV11697 — Install Instructions SV11695 — Install Instructions
JN50/JN55 Rollertop Scale	SV60510 — JN50/JN55 Scales Setup/User Guide & Parts Manual
JN6X (JN60, JN64) 150 lbs. Rollertop Scale	SV60621 — JN6X Scale Service Manual
J06X (J060, J064) 200 lbs. Rollertop Scale	SV60155 — Model J064 Scale Product Reference Manual SV60155-PL — Model J064 Product Parts List
J070/J075 100 lbs. Tabletop Scale	SV60045 — J070/J075 Scale Product Reference Manual SV60045-PL — J070/J075 Scale Product Parts Reference Guide
JN75 100 lbs. Tabletop (J075/JN75)	SV60552 — JN75 Scale Service Manual
Toledo 2038/2138 1000 lbs. Scale	
Mettler Toledo (2158) Lynx Floor Scale	

Scanners

J765 Non-Contact Programmable Laser Scanner	SV60651 — Install Guide
F196022 Contact Wedge Scanner	

Postage Meters

Manuals for Peripherals

A900 Electronic Postage Meter	SV50001 — Model A900 Postage Meter Operating Guide
B900 Post-Right Postage Meter	SV50385 — Model B900 Postage Meter User Guide
6500/6501	
E100/E101 Paragon Meters	SV208SS — Settings Instructions SV208ST — Settings Instructions
DM300	SV60691 — Operator Guide
DM300L/DM400L; DM300i/DM400i.	SV61304 — Operator Guide
DM350, DM400	SV61005 — Installation Instructions
DM400L	SV61301 — Installation Instructions
DM400i	SV61015 — Quick Reference Guide
DM500, DM550	SV60890 — Operator Guide
DM800, DM800i	SV61162 — Operator Guide
DM900	SV60861 — Operator Guide
DM1000	SV60951 — Operator Guide

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B Appendix B: Version Compatibility

Operating System and Upgrade Compatibility B-2
SendSuite Desktop Compatibility B-3

Operating System and Upgrade Compatibility

Specific Requirements for Each SendSuite® Shipping Version					
	SendSuite® Shipping Version				
	Prior to 6.20	**6.20**	**6.21**	**6.25**	**6.50**
Estimated Release Date	Call Customer Support	12/2008	03/2010	06/2010	12/2010
Compatible to Upgrade from	Call Customer Support	5.4 6.00 6.01	6.01 (original release and USPS update version), 6.20	6.20 6.21	6.20 6.21 6.25
Application Operating System	Call Customer Support	Win XP SP3 Win 2003 SP2	Win XP SP3 Win 2003 SP2	Win XP SP3 Win 2003 SP2	**32-bit mode:** Win XP SP3 Win 2003 SP2/R2 Win 2008 SP2 Win 7 [a] **64-bit mode:** Win 2008 SP2 Win 2008 R2 Windows 7 [a]
Database	Call Customer Support	SQL 2000 SQL 2005 SQL 2005 Express	SQL 2000 SQL 2005 SQL 2005 Express SQL 2008 (32 Bit Only)	SQL 2000 SQL 2005 SQL 2005 Express SQL 2008 (32 Bit Only)	**32-bit mode:** SQL 2000 [b] SQL 2005 SP3 SQL 2008 SP1 SQL 2008 R2 RTM **64-bit mode:** SQL 2008 SP1 SQL 2008 R2 RTM
Upgrading to SendSuite® Shipping Version 6.50	Call Customer Support	Supported [c]	Supported [c]	Supported [c]	

a Only for Admin Workstation and Thin Client Workstation.
b SendSuite® Shipping 6.50 will be the last version to support SQL Server 2000.
c Customers upgrading from Sendsuite 6.20/6.21 must also execute **Carrier Feature Setup** (from the SendSuite Shippping 6.5 menu) to complete the upgrade to SendSuite 6.50 (This is not required for customers upgrading from SendSuite 6.25).

SendSuite Desktop Compatibility

SendSuite Desktop	SendSuite Shipping								
	5.04	6.00	6.01	6.20	6.20 SP4	6.20 SP5	6.21 SP1	6.25	6.50
4.20	No [2]	No [6]	No [6]	No	No	No	No	No	No
5.00	No [1, 2]	No [6]	No [6]	No	No	No	No	No	No
5.10	Yes	Yes [5, 6]	Yes [5, 6]	No	No	No	No	No	No
5.25	Yes	Yes [5, 6]	Yes [5, 6]	No	No	No	No	No	No
5.26	Yes	Yes [6]	Yes [6]	No	No	No	No	No	No
5.27	Yes [6]	Yes	Yes	No	No	No	No	No	No
5.50	Yes [6]	Yes	Yes	No	No	No	No	No	No
5.60	Yes [6]	Yes	Yes	Yes	No	No	No	No	No
6.00	Yes [6]	Yes	Yes	Yes	No	No	No	No	No
6.01	Yes [6]	Yes	Yes	Yes	Yes	No	No	No	No
6.02	Yes [6]	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
6.03	No	No	No	No	Yes	Yes	Yes	Yes	Yes
6.10	No	No	No	No	No	Yes	Yes	Yes	Yes
6.20	No	No	No	No	No	Yes	Yes	Yes	Yes
6.50	No	No	No	No	No	Yes	Yes	Yes	Yes [7]

1 SendSuite Accounting – if sub accounts are used

2 SendSuite Address Verification engine compatibility

5 Carrier/Service UCU uploads are incompatible due a change in the SSS DB architecture. Therefore, if the previous version of the UCU is used (v5.20) with v5.26 and SSS, compatibility will be maintained.

6 Large Flat Rate Box will not work

7 The New Technology Release.

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